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ABSTRACT

This handbook is designed to help staff development persons, departments, and agencies use various educational approaches to involve business, industry, and labor in the professional development of vocational educators. The content is in ten chapters, and each one includes one or all of the following: rationale, benefits, content (includes planning, implementing, and evaluating), selected references, and resource materials (a variety of forms, letters, suggested procedures, and other similar aids that would be useful to vocational educators). The titles of these chapters are (1) Staff Development Programs with Inputs from Business, Industry, and Labor, (2) Workshops and Conferences--Effective vehicles for Staff Development, (3) Cooperative Internships--Contributions to Staff Development, (4) Structured Occupational Experiences--Establishing Structured Occupational Experiences Involving Business, Industry, and Labor, (5) Personnel Exchange Programs between Business-Industry-Labor and Vocational Education, (6) Advisory Committees--Establishing Educational Advisory Committees That Involve Business, Industry, and Labor, (7) Resource Persons from Business, Industry, and Labor, (8) Site Visits Arranged with Business, Industry, and Labor, (9) Resource Development--Support from Business, Industry, and Labor, and (10) Evaluating the Staff Development Program. (EM)

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TECHNICAL ASSISTANCE HANDBOOK

FOR

INCREASING BUSINESS, INDUSTRY, AND LABOR INPUTS INTO VOCATIONAL EDUCATION PERSONNEL DEVELOPMENT PROGRAMS

CE 016 707

The National Center for Research in Vocational Education
The Ohio State University
Columbus, Ohio

April 1978

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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FOREWORD

The rapid technological changes in business and industry require that vocational teachers and administrators keep up to date in order to provide relevant educational experiences for students. New and emerging occupations and changing work requirements demand that vocational educators receive inputs from and interact with business, industry, and labor.

The material in this handbook is designed to enable those in the marketplace and those in the educational system to work together in updating and upgrading the instructional competency and programs of vocational educators.

The handbook was developed to provide technical assistance to participants from ten states attending a conference at the National Center. These state team members carry the responsibility of creating and implementing plans to increase inputs from business, industry, and labor in vocational education staff development programs.

The interest and involvement of vocational educators across the country have contributed much to this handbook. Appreciation is expressed to those persons and to the National Center staff involved in this project.

Robert E. Taylor
Executive Director
The National Center for Research
in Vocational Education

PREFACE

This handbook is part of the technical assistance materials prepared for the EPDA national priority project to Increase Inputs from Business, Industry, and Labor into Vocational Education Personnel Development Programs. The chapters of the handbook are designed to enable staff development persons, departments, and agencies to use the various educational vehicles identified to aid in the professional development of vocational educators. These educational vehicles were chosen because of their ability to involve business, industry, and labor in the staff development process.

This project builds upon an EPDA project conducted by the Center last year to improve vocational teacher education department linkages with business, industry, and labor. The focus of this year's project and materials is on the inputs of B-I-L into personnel development programs at all levels and areas of vocational education. This technical assistance handbook adapts, revises, and adds to the resource handbook written last year by Richard Dieffenderfer, Lee Kopp, and Orest Cap.

Contributors to the current handbook are Orest Cap, Nevin Robbins, Daniel Fahrlander, Lorraine Furtado, Audni Miller-Beach, Janet Weiskott, and myself. Editorial assistance was provided by Joan Mitric.

Catharine P. Warmbrod
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CHAPTER 1

STAFF DEVELOPMENT PROGRAMS
with Inputs from Business, Industry and Labor

Introduction

Rationale

The intellectual and professional development of vocational educators is crucial to morale in an institution of learning and essential to the growth of skilled, motivated students capable of joining the work force as productive craftpersons. Very seldom, however, is a total staff development program initiated with identified goals, activities, procedures, and evaluation techniques outlined.

Benefits

A comprehensive staff development program insures the following benefits, among others:

- Increased ability of faculty to communicate world of work basics to their students
- Creation of an environment conducive to and supportive of the continual growth of educational personnel through structured in-service programs
- Creation of a program specifically geared to respond to problem areas in the classroom, the curriculum, and deficient skills
- A more highly motivated and professionally effective staff
- Increased status of the career education offered at the educational institution through community awareness of the personnel development program
- Updated teacher competencies

Staff Development Professional Growth Model

Staff development models may be viewed from two different, complex perspectives: repair and remediation and the growth approach.

Repair and Remediation Approach

This theory is also called the defect theory because it assumes something is wrong and proceeds to suggest specific remedies to alter deficient areas in the educational operation. This approach is task-oriented since goals are more definite, short-term, visible, and specific as it seeks to alleviate obvious problem areas.

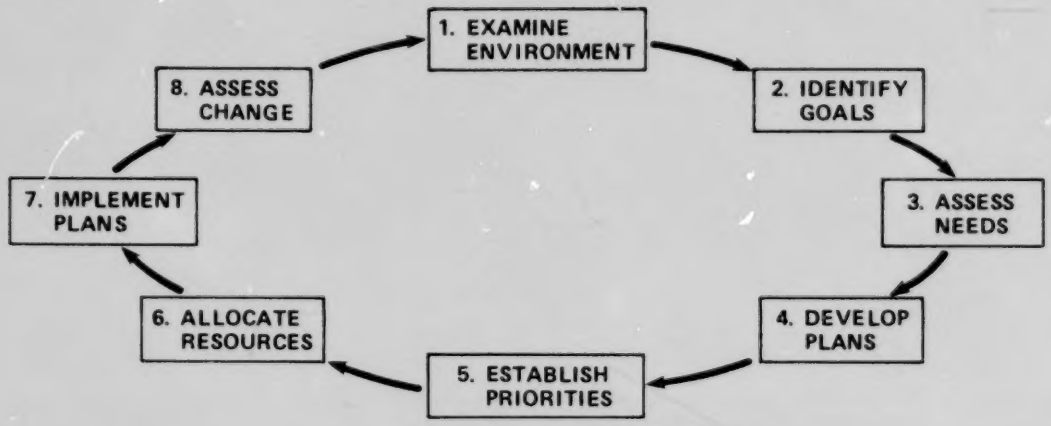
Growth Approach

This approach assumes that staff development is a continuous process. This approach seeks to aid the educator to become progressively sensitive to what is going on in the classroom and improve on what he/she is currently doing. It also seeks to motivate personnel to greater fulfillment and proficiency as practitioners of the art.

Model Procedures

The following model is procedural rather than philosophical.

The eight steps or planning stages are numbered sequentially and are self-explanatory.



Planning

Examine Existing Policies/Procedures and History of Staff Development

The structure for planning, organizing, and implementing the staff development program must fit within the particular educational system and be compatible with objectives and instructional practices. Use the following questions to point up problem areas:

- At what level(s) does staff development planning currently take place—department, school, across a variety of institutional levels?

- Is staff development part of employee evaluation procedures?
- Is staff development left to the individual who must develop an acceptable plan for self-improvement?
- What type of institutional support has been given to personnel development plans?
- What kinds of links are there with the business, labor, and industrial communities?
- Do individuals report progress toward stated goals?
- Is there any evaluation process or follow-up on record?

Assess Current Staff Development Needs

This planning step involves analyzing weaknesses and strengths in skill areas and knowledge that currently exist as compared to desired staff achievement.

Prepare need statements from this analysis. Some ways in which needs may be identified include a review of: the personnel review process, staff attitude and skill surveys, student evaluations of classroom performance and teacher technical competency, and job descriptions of current or emerging staff positions.

Establish Priorities

Priorities in any development program ought to be those needs which an individual's own planning and action cannot readily alleviate.

Determine Available Resources

Determine what kind of funding support the institution/department can offer and who will take up the slack. Goals and strategies must realistically fit the funding picture or fail before they start. See Chapter Nine for a detailed discussion of Program Support and how to develop funding sources.

Develop Plans

Studies prove that more positive change occurs when staff members have the opportunity to become involved in planning and implementing their own professional staff development program. Areas where their input is valuable include:

- Securing administration approval and support
- Appointing a planning coordinator
- Assigning the planning responsibility for the development program to a staff committee or a joint group of advisory personnel and staff

- Establishing the need for increased interaction between business, labor and industrial segments of the community

Assess Change

Evaluation techniques should be established in and used throughout the earliest planning stages. Continuous assessments will show the need for directional changes, and further effort, or may show that the objectives are being or have been met.

See Chapter Ten for further information on evaluation and the development of evaluation instruments.

Staff Development Approaches

Once the decision is made to create or strengthen the staff development program, several choices for assigning responsibility exist.

- Committee approach, administrator approach, staff position approach, or individual approach

Committee Approach

This approach involves the appointment of a staff development committee.

Advantages

- The resulting program should have relevance if membership includes staff who are involved in upgrading skills and other forms of professional development.
- If the committee is school/college-wide, a coordinated program should result.

Disadvantages

- The problem of assigning budgetary responsibility still exists.
- Because of the difficulty of assigning budget responsibility to a committee, the program is not likely to get funding except on an item-by-item basis.
- Committee appointment never insures sufficient knowledge and experience in the techniques of faculty development.

Administrator Approach

In this approach the department chairperson organizes the staff development plan. This approach may or may not include the input of staff or an advisory committee.

Advantages

- Responsibility is fixed.
- Results and budget are more likely.
- If combined with a good advisory committee, this approach can be quite effective.

Disadvantages

- Resulting program will reflect administrative concerns, unless staff advisory committee is involved.
- Assigned extra duties of administrators often do not get the attention they need.
- Many administrators do not have the background or expertise to deal with staff development.

The Staff Approach with an Advisory Committee

When the staff person is assisted by an advisory committee, this approach usually gets good results.

Qualifications for the staff person include:

- Teaching experience
- Training in instructional development, human relations, organizational behavior, group dynamics, and theories of adult learning and change process
- Good organizational skills

Individual Approach

An individual staff member is held responsible for planning and implementing a staff development program without input from an advisory committee.

Essentials for Effective Staff Development

A growth or long-range approach to staff development is more difficult to plan than the short-term, remedial approach because it involves the creation of a suitable environment among teaching staff and administrators.

The following conditions contribute to an effective program:

- Acceptance of the concept of "release time" for teachers to learn, think, grow
- Payment for time contributed

- Willingness to support staff development programs financially and philosophically
- Ability to foresee the implications of educational reform such as:
  - implications of technology in the world of work: increased leisure time, more people in service occupations
  - increased computer use in education
  - changing structure of schools and their relationship to world of work
  - emerging team approach, teachers often using professional, business, industry, and labor representatives
- Staff development relating to teacher's assigned role and responsibilities
- District-wide diagnosis of teaching/learning problems
- Teaching styles which stress individually-guided or self-initiated approach to pupil learning
- Improved reward system for staff development
- Simultaneous development of staff and curriculum
- Leadership to excite intellectual curiosity of staff

Planning Checklist

The purpose of the Planning Checklist is to list the major items that are involved in planning staff development programs to increase business, industry, and labor inputs into vocational education staff development.

- ☐ Explore history of staff development efforts in institution and department
- ☐ Identify staff to be involved in planning
- ☐ Identify administrative procedures necessary for clearance
- ☐ Identify financial resources
- ☐ Determine department needs
- ☐ Determine individual needs and related objectives
- ☐ Select from alternative methods those best suited for meeting needs and objectives
- ☐ Determine the balance between institutional priorities and individual needs
- ☐ Determine person responsible for coordinating implementation

- ☐ Determine staff qualifications for participation
- ☐ Determine staff incentives
- ☐ Determine program schedule
- ☐ Implement program
- ☐ Evaluate program

Implementing

In order to set up a staff development program within an existing framework, consider the following areas of inquiry:

- What strategies will lead to initiation of the program?
- What approaches will alert educators of the need to participate in a staff development program?
- Who is the target audience at a given school?
- Who should be the staff development coordinator?
- What should be the content, methodology, and design of staff development programs?
- What support materials are needed to implement/facilitate staff development activities?

Educational improvement demands behavioral changes, and a problem-solving atmosphere in which the teacher is continually involved. Some elements in this process are:

- Clarifying role relationships
- Establishing supportive group norms
- Learning skills that function effectively in groups.
- Developing open, trusting, mutually-supportive climate

Participants in a professional growth program should be able to enter either as independent agents seeking help in a particular skill area or as members of a peer group who perform similar roles and want joint activities to upgrade skills.

Potential Barriers

Many major barriers to the development of a professional growth program exist in most institutions. Planners must develop a process and a program that deal with:

- Possible negative attitudes on part of staff or administrators
- Faculty work load
- Budget restrictions
- Internal resource limitations

Guidelines for Involvement

Faculty should be made aware of the criteria and guidelines for various opportunities to participate in business, industry, and labor linked activities. Such opportunities include:

- Leaves of absence
- Institutional professional days/released time
- Sabbaticals/externships/internships/field studies
- Retreats/seminars/workshops
- Case studies/simulations

Faculty must be aware of associated work and requirements that go along with participation in a professional growth program such as:

- Criteria for participation
- Associated paper work
- Necessary clearance channels
- Financial responsibilities

Assessing Impact

The only true "index" of the effectiveness and quality of staff development programs lies in the educator's classroom performance and in student learning. These are direct pay-off success indicators. There also are at least five conditions for a successful program:

- Sufficient time to participate
- Adequate financial resources
- Program relevant to identified problems
- Applicability of program to regular school situations
- Ability to conduct program with available materials and supplies

Evaluation

Any evaluation of the impact of a staff development program is only as good as the objectives developed. Professional programs must lead to increased performance levels with respect to subject matter, knowledge, and behavioral skills. Staff development programs which are effective are characterized by six dominant aims:

- Flexible staff teaching styles
- Capacity of staff for self-renewal
- Receptiveness of staff towards change
- A demand for intense, open involvement by participants
- Immediate consequences for school/teaching practices
- Program initiation and organization by respected educators rather than "outsiders"

Selected References

This part of the handbook section lists selected reference materials that pertain to planning and conducting staff development programs. In addition to these materials, each service area has a multitude of organizations and publications that are related to that particular service area. The library should be helpful in identifying these. You are encouraged to add to this list.

Print Materials

American Association of Junior Colleges. *Guide to Inservice Training for Two-Year College Faculty and Staff Members.* Washington, D.C.: AAJC. 1970.

Bittell, L. R. *What Every Supervisor Should Know.* 3rd Edition. New York: McGraw-Hill Book Company, 1974. (Includes text, performance portfolio, and instructor's manual)

Craig, R. L. (ed.) *Training and Development Handbook, A Guide to Human Resource Development.* New York: McGraw-Hill Book Company, 1976.

Justice, P. *Instructional Staff Development in the Community College—An Instructional Model.* Gresham, Oregon: Mt. Hood Community College, 1977.

Strong, M. E. and Schaefer, C. J. *Introduction to Trade, Industrial, and Technical Education,* Chapter 9. Columbus, Ohio: Charles E. Merrill Publishing Company, 1976.

Periodicals

- *Public Personnel Management*
- *International Personnel Management Association*

- *Training: The Magazine of Human Resource Development*
- *Wood Publications, Inc. Training and Development Journal*
- *Journal of Teacher Education*

Groups/Associations

Current addresses for the national office can be located in the library reference section.

- American Management Association
- American Society for Training and Development
- International Personnel Management Association
- National Society for Performance and Instruction
- Association for Educational Communications and Technology

RESOURCE MATERIALS

The example materials illustrated in this part are designed to be adapted and used selectively as your situation dictates. The purpose of these materials is to show a variety of standard forms, letters, suggested procedures, and other similar aids that would be useful to vocational educators.

List of Illustrations:

- Professional Development Plan
- Annual Evaluation and Professional Development Plan
- Application for Professional Development Plan
- Report of Professional Development Activity
- List of Staff Development Activities with B-I-L Input
- Sample Agreement for Sabbatical Leave
- Procedures for Administration of Sabbatical Leave
- Compendium of Teaching/Learning Approaches

PROFESSIONAL DEVELOPMENT PLAN

Name_____ Phone:

Office_____

Address_____

Home _____

_____

Instructional Area_____ No. Years Teaching_____

SPECIFIC COMPETENCIES TO BE DEVELOPED: List here the competencies to be developed based on needs assessment and/or personnel interest.

Competencies Needed	Expected Completion Date	Actual Completion Date

PROCEDURES FOR COMPETENCY ATTAINMENT: List or describe here the procedures to be used to achieve the identified competencies.

_____ _____ _____ _____

Signature of Supervisor Date Signature of Teacher Date

_____

Signature of Coordinator

ANNUAL STAFF EVALUATION AND PROFESSIONAL DEVELOPMENT PLAN

Staff Member_____

Division_____

Evaluation

Recommendations for Improvement Prior to Next Evaluation

SIGNATURES:

_____
(Staff Member)

Approved By:

_____
(Immediate Supervisor)

_____
(Date)

Annual Evaluation and Professional Development Plan

ANNUAL STAFF EVALUATION AND PROFESSIONAL DEVELOPMENT PLAN

Professional Staff Development Plan to be Completed Prior to: _____
(To be Completed by Instructor) Date

1.

2.

3.

4.

5.

Instructor Comments

SIGNATURES:

Approved By:

_____ (Staff Member)

_____ (Immediate Supervisor)

_____ (Date)

Annual Evaluation and Professional Development Plan (Continued)

STATE INSTITUTE OF TECHNOLOGY

Application to Attend Seminars,
Workshops, Conventions, Conferences, Etc.

NAME OF APPLICANT_____

CONFERENCE, ETC._____

WHERE HELD_____

DATE OF CONFERENCE, ETC._____

PURPOSE OF CONFERENCE, ETC._____

_____

_____

_____

VALUE TO THE INSTITUTE_____

_____

_____

ESTIMATED COST:

TRAVEL_____ Improvement Credit Allowed:

LODGING_____ _____

FOOD_____ Comments:

CONFERENCE FEES (Identify)_____

_____

OTHER (Identify)_____

SUBSTITUTE IF NECESSARY_____

TOTAL_____

APPROVAL_____ DATE_____
Department Chairman

APPROVAL_____ DATE_____
Administration

Application for Professional Development Plan

STATE INSTITUTE OF TECHNOLOGY

(To be completed within one month after activity)

NAME OF PARTICIPANT_____

DATES OF ACTIVITY_____

ACTIVITY--TITLE AND LOCATION_____

_____

_____

BRIEF DESCRIPTION OF ACTIVITY_____

_____

_____

_____

_____

OUTCOME:

Value to Individual for Self Improvement_____

_____

_____

_____

Value to the Institute_____

_____

_____

_____

_____

Report of Professional Development Activity

Vocational Teacher Education Programs can:

1. Obtain assistance to establish a departmental advisory committee with representatives from B-I-L.
2. Obtain help with manpower study, community survey.
3. Obtain assistance with student recruitment or search for new recruitment methods.
4. Implement cooperative programs between the department and B-I-L.
5. Arrange business-industry or labor experiences for faculty members.
6. Arrange for B-I-L input concerning the dropping establishment or modification of courses.
7. Identify new skill requirements.
8. Arrange for teacher observation periods.
9. Cooperate in the preparation of reports, symposiums, seminars, workshops for advancement and conferences.
10. Obtain speakers.
11. Obtain help in validating new materials.
12. Cooperate in joint research projects and land a federal grant.
13. Get B-I-L to donate or loan new equipment, numerous materials, models and mockups.
14. Receive support when attempting to develop new options or programs.
15. Develop or restructure their field experiences.
16. Exchange vocational teachers with B-I-L trainers.
17. Obtain assistance from labor concerning legal requirements in cooperative programs.

List of Staff Development Activities with B-I-L Input

18. Utilize work stations in B-I-L for teaching work experience.

19. Arrange for business/industry tours and transportation to sites.

20. Help improve the selection of part-time instructors for adult vocational programs.

21. Help examine industrial training opportunities for vocational teachers.

22. Use the management/labor relationships experience of B-I-L in teacher education programs.

23. Use industrial, business or labor representatives as lectures or part-time staff.

24. Obtain help dealing with personnel practices, contracts, collective bargaining.

25. Obtain help in sponsoring or setting up new student club program.

26. Have access to business/industry facilities for conducting some educational activities.

27. Obtain assistance from business-industry-labor committees when evaluating vocational teacher's occupational experience.

28. Help identify needed competencies.

29. Obtain corporate grants for expansion of program.

30. Develop an externship for vocational educators.

31. Discuss new management techniques, styles and business organization programs.

32. Obtain a loan of instructional staff from B-I-L or labor.

33. Have access to labor union facilities.

34. Use B-I, to evaluate the adequacy of equipment, etc.

35. Help maintain and establish a library concerning B-I-L.

36. Assist in the development of training programs.

List of Staff Development Activities with B-I-L Input (Continued)

37. Obtain grants, scholarships and awards for students or teachers.

38. Obtain aid dealing with the management aspects of the teacher department.

39. Help seek research opportunities for instructors.

40. Obtain a loan or gift of publications available from B-I-L.

41. Obtain assistance with certification requirements of teachers.

42. Obtain funds to help teachers attend industry, business, conference.

43. Obtain industry membership dues for teachers.

44. Have a closer cooperation with B-I-L magazines and establish better public relations.

45. Obtain their cooperation in the development of a local B-I-L resource directory.

46. Obtain funding to advertise or finance new training programs.

47. See that they are provided with demonstrations of the latest techniques in some particular area.

48. Obtain access to B-I-L technical library.

49. Obtain involvement of other companies.

50. Obtain a first-rate source of information on job characteristics.

51. Facilitate contacts with other decision-makers at many levels.

52. Seek their help to testify in special study commissions.

List of Staff Development Activities with B-I-L Input (Continued)

(Name of Institution)
(Department Title)
(Address)

AGREEMENT

WHEREAS, _____,
is a faculty member for the (title of department) (name of institution) and;

WHEREAS, the said _____ is desirous of having a _____ leave for educational purpose and;

WHEREAS, the said _____ has complied with the requirement for application for such leave and;

WHEREAS, the application of said _____ has been approved by the board of (name of institution). One subject to the entering of a formal agreement and signing of a note according to the conditions of the agreement approved by the Board, effective January 1, 19__.

NOW THEREFORE it is hereby agreed between _____ and (name of institution) that:

1. The Board shall grant a _____leave commencing on the _____day of _____, 19__, until the _____ day of _____, 19__.

2. That during this period the Board shall pay to the said _____ one-half (½) of his usual salary (including fringe benefits) for the period of such leave.

3. That the said _____ may pay the other one-half (½) of his fringe benefits.

4. That in consideration of the Board's action the said _____ agrees to teach for (name of institution) for a period of two years after the expiration of said leave.

Sample Agreement for Sabbatical Leave

5. That to insure the compliance of clause four (4) above, the said _____ agrees to sign a note in the amount of $_____ and that in the event _____ fails to teach the two years as agreed to, said note will become due and payable as liquidated damage.

6. That said not shall be canceled upon the completion of two years of teaching after termination of said leave or upon death or total disability of said_____.

Dated this_____ day of _____, 19___.

_____

(name of institution)

By: _____

_____

Sample Agreement for Sabbatical Leave (Continued)

PROCEDURES FOR ADMINISTRATION OF SABBATICAL LEAVE

The following procedure will be followed in the administration of the sabbatical leave provision of the negotiated faculty contract:

1. Requests shall be made in writing to the department director or his designated representative. Such request shall state the nature of the program of professional improvement that the faculty member contemplates pursuing during the period of the leave and how such improvement would assist him in performing duties assigned by (title of department), (name of institution).

2. In accordance with established payroll procedure on the basis of 50 percent of the amount received if performing as a full time staff member, salary will include fringe benefits such as insurance, accumulated sick leave, etc, in accordance with the prorate of salary. Experience increment will be given for a period of time while a staff member is on leave.

3. Applications requesting sabbatical leave will be received by the department director by February 1. Within 30 days after the application deadline, the director will inform the applicant of action taken on the request. Where such leave is granted the staff member will have 15 days within which to sign an agreement to accept such leave. Where applications exceed the number of leaves to be granted, an alternate will be selected. When a staff member awarded sabbatical leave indicates in writing that he will not be accepting such leave, the alternate will be notified and provided a 15-day period from notification in which to sign the leave agreement.

4. Applicants for sabbatical leave must be fully certified or eligible for such certification for the period of time they are obligated to employment with (name of institution) as a result of accepting leave.

5. Where the recipient of sabbatical leave is pursuing graduate studies he shall be enrolled in no less than the average number of credits required at the institution for a full time student and shall maintain a B grade average.

6. Distribution of sabbatical leave recipients among the departments will be followed wherever feasible. At no time will leave be granted to more than one member from a department.

7. The recipient shall submit to the director an initial report within 30 days after the start of his sabbatical leave activity and thereafter at intervals not in excess of 60 days throughout the sabbatical leave period. Each report will concisely summarize the recipient's

Procedures for Administration of Sabbatical Leave

professional activity toward meeting the objective for granting such leave. A final report will be submitted by the recipient which will supplement any official transcript of any credits earned and testify to the type of program pursued during the leave.

8. If the director is convinced that an employee on sabbatical leave is not fulfilling the purpose for which such leave was granted, he shall report the same to the board. After giving the recipient a chance to be heard the board may terminate the sabbatical leave as of the date of abuse.

(title of department)
(name of institution)
(address)

PROMISSORY NOTE

$_____ _____, 19__.

FOR VALUE RECEIVED, the undersigned promises to pay on demand to (name of institution), the sum of $_____, together with interest thereon commencing from the date of demand for payment, at the rate of 7 percent per annum.

This Promissory note is issued by the undersigned pursuant to that certain Agreement between the undersigned and (name of institution) providing for a _____ leave for the undersigned from the employ of (name of institution), with salary, from the _____ day of _____, 19__ until the _____ day of _____, 19__, which Agreement contained a provision that in consideration of the granting of said _____ leave to the undersigned, with a continuation of salary as provided for therein, the undersigned agreed to return to the employ of (name of institution) for a period of two years after the expiration of said leave.

The undersigned executes this note, then, upon the express condition that it will be null and void if in fact the undersigned does return to the employ of District One at the commencement of the school year, and teaches for a period of two years thereafter. Upon the completion of said two years of teaching, or upon the death or total disability of the undersigned this note shall become null and void.

DATED: _____, 19__. _____ (SEAL)

The conditions set forth above are hereby approved.

(name of institution)

DATED: _____, 19__. By: _____

TEACHING/LEARNING APPROACHES

The Teaching/Learning process may take a variety of forms. For example, it may require the teacher's participation to a greater or lesser degree; and it may be determined by the student to a greater or lesser degree.

The Teaching/Learning approaches listed and defined below have been included because they are teacher/learner centered.

Activity Cards

These are a series of cards, each card containing complete directions for a single activity. Activities are related to study objectives and are intended to reinforce or extend class learning. Activities may be carried out by individuals or small groups.

Anecdote

A work "snapshot" of an isolated incident which illustrates some significant concept.

Apprentice Approach

A method of instruction where a person inexperienced in an occupation is matched with a more experienced worker in order to learn the skills and competencies of the occupation.

Audio-visual Aids

Every instructor is familiar with a wide variety of aids that can be used to convey or reinforce concepts, skills, etc. These include filmstrips, 16mm films, 8mm films, video tapes, opaque projector, tape recorder, etc.

Book Report

A written or oral report that summarizes the extensive reading of book, report or article. Report might also involve visual displays, short acted scenes, etc.

Brainstorming

In brainstorming, participants spontaneously express their thoughts about a specific problem—it is a let-yourself-go session that calls for ingenuity and creativity in seeking a solution to a problem. Brainstorming is used to elicit both numerous and unique ideas.

Bulletin Board

Students or instructors may assemble pictures, materials, etc. for display. Display will convey a concept relating to study.

Buzz Groups

Several small groups within a larger class or group that meet, generally after a general session, to discuss the presentation, analyze a problem, or prepare questions for the larger group.

Cartooning

Students may use cartooning to convey a message or point of view about area being studied. Cartoons use exaggeration and symbolism to convey the message.

Case Study

The case study provides a description of a realistic situation. Participants are encouraged to resolve problems as if they were personnally involved.

Chart

A visual, systematic arrangement of facts. Used for convenient reference of facts, comparison of quantities, distributions, summaries, trends, etc. Facts may be in graphic or pictoral form.

Clinics

Participants are trained by clinic leaders. Activities include one-to-one, small and large group activities.

Community Analysis/Study

The community is used as a tool to accomplish goals. For example, the community is used to select a site for several different types of businesses.

Conferences

Conferences are usually used for problem-solving and fact-finding. Activities include a variety of large and small group sessions. Participation of attendees is expected.

Crossword Puzzle

The use of crossword puzzles as an activity reinforces vocabulary and/or concepts. Puzzles do not need to be complicated and can be created by students as well as instructors.

Demonstrations

Demonstration is the procedure of doing something in front of others either as a means of showing them how to do it themselves or in order to illustrate a point. The effectiveness of this instructional technique depends on the participants having a clear view of what is being presented.

Exhibit

An exhibit is a collection of materials arranged to convey a specific idea.

Games

A game is a representation of significant or central features of reality that require the participants to become actively involved in an experience rather than merely witness it. Game is a broad term and includes many techniques such as in-basket, case study, and role-playing.

Group Discussion (Guided)

Guided group discussions are characterized by adherence to topic or a problem for which the group participants want to arrive at a decision or conclusion. This type of discussion is generally directed by a leader.

Hands-on Experience

Participants are actually involved in trying out or creating a technique, product, or procedure. This often follows a demonstration.

In-Basket

This technique is used to develop decision-making skills which focus on participants' abilities to set prioritites and carry out tasks. Participants are asked to assume specific roles and responsibilities. They are provided written information in memo form about a number of tasks that they must complete. Participants must determine which tasks they would attend to and in what order.

Independent Study

A study or activity carried on by an individual to accomplish specific objectives, which could include the learning of specific skills or knowledge.

Institutes

Institutes are usually used for training. Activities include a variety of large and small group sessions. The instructional staff provides most of the resources.

Interview

A meeting of two or more persons for the purpose of obtaining information. Interviews may be conducted in person or by phone. Interviews may be taped, with permission, for later use in class.

Panel Discussion

A panel consists of a group of experts on a particular issue or problem who participate in a discussion on the topic and/or answer questions raised by class or group participants.

Project

A project is an activity involving one or more class or group members designed to achieve definite goals. It involves investigation and solution of problems and the use of manipulation of materials. Emphasis is on "real-life" situations.

Resource File

A file which includes pertinent details on persons, sites, etc. that have been effectively used for class study. The filing system might include contact name, organization name, phone number, address, and comments.

Resource Persons

Persons in the community actively involved in the class's area of interest provide an excellent source of information. Resource persons can be used as speakers, panel members, and interviewees. They can provide instructional resources, materials, and on-the-job learning sites. Care should be taken to avoid overuse of individuals and appreciation for services should always be expressed.

Role-Playing

Role-playing is an instructional technique in which participants assume roles other than their own. Structured settings are described and participants have the opportunity to express feelings, work out problems, and experience other persons' roles.

The objective of a role-playing situation might be to suggest alternative solutions to a problem, to gain an understanding of another's feelings, or to gain an experience in new situations. The situation should be clearly presented to participants.

Seminar

Seminars are used by groups of experienced persons to share experiences. Activities usually include small group sessions under the guidance of a group discussion leader. There is a great degree of attendee participation.

Simulation

A simulation is a representation of significant or central features of reality that requires the participants to become actively involved in an experience rather than merely witness it. Simulation is a broad term and includes many techniques such as in-basket, case study, and role-playing.

Site Visit

A trip arranged for a class or group where instructional materials, activities, etc. may be observed in their functional setting. Site visits may include trips to local businesses and industries.

Speaker

This is a more formal way of presenting information. This is an efficient way of presenting information to a large group of people. The drawback is usually the lack of audience participation.

Symposium

A symposium consists of a group of brief presentations on various aspects of a particular issue or problem. Generally, after the prepared presentations, speakers participate in discussion and/or answer questions raised by class or group participants.

CHAPTER 2

WORKSHOPS AND CONFERENCES
Effective Vehicles for Staff Development

Introduction

Rationale

Group meetings are a time-efficient means for improving the performance of staff by helping them acquire, enhance, or update professional skills, attitudes, and understanding. With sufficient and proper planning, group meetings become a cornerstone to an effective staff development program.

This chapter shows the complex mix of foresight, decisions, interpersonal relations and action involved in going from the planning drawing board stage to the successful completion of a quality workshop, seminar, conference or institute. (The term group meeting will be used throughout the chapter to encompass all these categories.)

Benefits

Conducting workshops and conferences makes possible new opportunities for accomplishing a variety of goals. Some positive results include:

- More efficient use of time and other resources by participants.
- Increased dialogue between educators and members of the business, labor, and industrial communities.
- Increased flexibility with regard to problem-solving approaches.
- Shared expertise and concerns in group sessions to achieve common goals.
- Planning for group meetings and their alternatives will be facilitated.
- Impact of meetings will be enhanced by making a meeting serve the definite purposes set for it.
- Meeting methodology will be adapted to the persons and goals rather than vice-versa.

This chapter is divided into four major sections which imply a sequence: pre-planning, planning, implementation and evaluation. Evaluation is the one component that is constantly at work throughout the other three planning stages. In this way, revision, modification and improvement are built into the earliest of planning stages.

Pre-Planning Considerations

Pre-planning in essence means getting organized. It paves the way for well thought-out and unhurried decision-making, cooperation, and program success. Among components of this stage are:

- People and organizations with potential involvement are considered.
- Planners are identified.
- The meeting's initial purpose is examined.
- Relevant groups are identified and analyzed.
- Forces which may facilitate or complicate the meeting are determined.
- Strategies for working with persons associated with the meeting are considered.

Pre-planning may be intuitive to some degree, but it is often found to make the critical difference between high quality meetings and those of questionable value.

Purpose of Meeting

Three aspects under the general umbrella of purpose should be considered: the basic intentions, openness to change, and the benefits of thinking through both items.

- Why does your organization want to host this workshop or conference? Be honest in evaluating ulterior motives as well as public positions. Knowing your initial purposes makes it possible to direct planning operations towards immediate actions or long-range outcomes.
- How flexible are the goals, content, organization or process of the meeting? Will you be willing to modify the content and organization based on the findings of solicited information, outside help, advice?

  Most conferences fail because of the discrepancy between what the planners think participants need to know and what participants want to know.
- Making your initial purpose explicit simplifies early planning:
  - communication of goals is easier
  - knowing the concrete focus, goal of the conference makes all future planning less difficult to structure

Target Audience and Sponsor Situations

Both the target audience and the sponsoring group(s) perform particular job functions, individually and collectively, and represent certain segments of one or more organizations or groups. Taking into account the social context and situations of these groups makes early planning more effective.

Adult Learners as Conference Participants

Conference participants are usually adults whose time and involvement are not to be taken lightly. To be successful, the conference must be treated as a learning situation involving a complicated group of learners. Experience shows that several techniques improve the impact that short-term learning events may have upon adult learners. Six techniques are suggested:

- Involve learners in the development or approval of the meeting's content. A simple feedback questionnaire with room for revision may accomplish this purpose. Representation on an advisory or planning committee is another alternative.
- Stimulate motivation by setting the tone as one of learning (not just sitting). Accurately determine and communicate their and your expectations.
- Relate the meeting's purpose and content to participants' work situations.
- Treat learning as building upon current knowledge, not as totally new input.
- Never underestimate participants' creative or analytical abilities.
- Match desired learning outcomes with best presentation methods.

Choosing a Meeting Place

The planning process should consider both the benefits and possible problems of meeting in a setting other than the work environment.

Benefits:

- Freedom from everyday work distractions; ability to concentrate
- Emphasis on goals and immediate tasks
- Development of group dynamics, roles and processes; openness, enthusiasm, and commitment often result
- Easy experimentation with new ideas, beliefs, approaches, methods
- Immediate or at least apparent behavior changes

Problems:

- Resistance to sharing professional or personal problems with participants
- Unreal situation; doesn't resemble everyday work or life situation
- Changes developed in isolation not firmly established till proven in real work world
- Loss of group support when participants return to real world
- Participants must be prepared to deal with suspicions, conflicting opinions of non-participants

Planning Phase

During this phase a plan of action is developed and appropriate arrangements are made. Make contacts, establish communication, develop expectations and secure commitments. Some decisions are in the form of mutual understandings; other are contractual.

Types of Sessions

Many types of meetings may be developed to bring people and resources together. Brief descriptions of several types of alternative sessions are listed.

Clinic	–	Small group sessions, emphasizing diagnosis and analysis of problems arising from participants' experience. Clinic leaders direct exploration of problem areas.
Conference	–	General sessions and face-to-face groups; used for problem solving, fact-finding, presentation of information, training, exchange of experience, developing inspiration and securing commitment to action. Relies on participation by attendees.
Exhibition	–	Display of ideas, products, or processes; used to illustrate or promote information, materials or procedures. Uses graphic and audio-visual media.
Forum	–	General session; used to facilitate orderly, public discussion after a topic has been introduced. Relies upon skilled moderator and mature participants.
Institute	–	General session and face-to-face groups; used for developing knowledge and skills in specialized area of practice. Uses staff-provided resources.
Seminar	–	Face-to-face groups; used for intensive examination of relevant topics. Utilized discussion leaders as well as content experts. High degree of attendee participation and shared experience a necessity.
Short Course	–	Series of content-specific general sessions or face-to-face groups; used to provide intensive training over immediate period of time. Uses staff-provided resources and coordination.
Symposium	–	General session; used to present several viewpoints on predetermined topics. Uses brief, related speeches by content experts.
Working Conference	–	Organized like a conference, but places heavy emphasis on resolving problems rather than addressing topics or issues. Relies on attendee preparation prior to meeting and participation during meeting. Program is especially designed to maintain group focus upon problem-solving process.

Techniques for Facilitating Learning

Often the conference program uses several techniques to encourage participation. Some techniques serve particular objectives better than others, while others help avoid monotony. Techniques for facilitating group participation and learning are presented below.

Audience Reaction Team	–	Small group of staff or self-selected persons from the audience join the speaker or resource person, and representing the audience, raise questions and seek clarification.
Brainstorming	–	Freewheeling, uninhibited group discussion intended to elicit as many ideas from the group as possible, with no thought to practicality or logic. Emphasis is upon creative responses to a topic. Rationale use of them follows later.
Buzz Session	–	Involvement of every member of audience in brief (5-7 minutes) discussions on particular topics. Audience is divided into small groups (5 to 7 persons) each person presents his/her views.
Case Study	–	Description of a realistic situation that participants are encouraged to consider; may attempt to resolve as if they were personnally involved.
Demonstration	–	Presentation that shows how to perform an activity or to use a procedure. Often followed by the learner carrying out the activity under the guidance of an instructor.
Discussion Group	–	Meeting of persons to deliberate on topic of mutual concern in order to attain better understanding of topic or to arrive at a decision or conclusion. Generally directed by discussion leader.
General Session	–	Meeting of total participant group to receive information or to achieve consensus.
Hands-on Experience	–	Participant activity which tries out or creates a technique or product. Often follows a demonstration.
Ice-Breaker	–	Variety of group activities in which participants become more at ease with each other by learning each other's names, backgrounds, and interests.
Interview	–	Presentation in which one or more resource person responds to questioning by one or more prepared and skilled interviewers.
Lecture (Speech)	–	Prepared, formal presentation of information by a qualified expert to an audience. Speaker may provide hand-out materials and use audio-visual media to complement oral presentation.

Listening Team	–	Small group from the audience who listens to speaker, takes notes, asks questions or summarizes topic at the close of a presentation. Serves as a means of providing interaction between speaker and audience.
Panel Discussion	–	Small group of experts on a particular issue, topic, or problem who hold an orderly discussion on an assigned topic in full view of audience. Panel discussion is often followed by questions from the audience.
Question Period	–	Follow-up session to a formal presentation in which audience directs questions to program participants.
Role-Playing	–	Acting out of real life situations based upon participant's understanding of the role. Used to explore the viewpoint of another person, express feelings, work out problems, and gain experience in new situations. Often followed by group discussions of the implications of the performance to the situation or problem being considered.
Simulation	–	Representation of significant or central features of reality that serve as the context for participant involvement in an experience rather than merely observing it. May utilize techniques such as case studies or role-playing.
Site Visit (Tour, Field Trip)	–	Pre-arranged group visit to an object or place of interest for firsthand observation.
Skit	–	Short, rehearsed, dramatic (though not necessarily serious) presentation involving two or more persons. Usually acted from a prepared script to illustrate a situation or a problem.
Skill Practice Group	–	Relatively small group of persons who meet under supervision to practice and improve recently-acquired skills.
Special Interest Group	–	Relatively small group of persons meeting to exchange opinions and ideas about common interests, responsibilities, or experience.
Work Group (Task Force)	–	Relatively small group of persons who meet several times to work on a problem or assigned task and come up with actions, recommendations, decisions, or findings. A report is often expected.

Laying the Groundwork

The first step of actual planning expands and formalizes much of the work begun as pre-planning considerations. The planning group is officially gathered and assigned responsibilities. Based upon a thorough analysis of sponsor and target population situations, participant needs and

goals are determined. Objectives are then developed for the meeting and arranged in priority order. The information prepared during this process then serves as the necessary groundwork for planning decisions about conference activities and logistical arrangements.

Organize Planning Group

Persons identified in the pre-planning stage as relevant to the project should now be organized into a planning group. As described earlier, different persons may perform different roles.

In essence, the total planning resources should include a work group and advisory group(s). The work group will become involved in information collection and analysis, objective formation, and final decision making. The advisory group provides additional insights into relevant issues and problematic situations.

Determine Needs and Goals

During the pre-planning stage, a general idea of why the sponsor wants to develop the meeting emerged along with the reason members of the target audience might want to participate. Now analyze these facts. The analysis process primarily becomes a matter of identifying, clarifying, and relating sponsor and conference goals and target audience "needs." Group goals into learning and other categories. Some goals indicate specific new abilities or attitudes that conference meetings are supposed to develop. Other goals may be more concerned with group dynamics and processes, such as determining participants' opinions, creating new relationships among sponsors and participants, or seeking group decisions on relevant issues.

The *needs analysis* aspect of the process can range from a simple analysis to a quite long and involved needs assessment. Consequently, the following discussion will suggest some reasonable methods for determining needs of conference participants.

Two effective approaches to determine needs in education are the problem-analysis method and the competency-model method.

Problem Analysis Model

This model determines needs in a systematic process clarifying problems or concerns so that causes and solutions indicate what resources or actions are needed.

- Solicit statements about unacceptable conditions
- Clarify and substantiate the statements
- List unacceptable conditions along with appropriate remedies

The Competency Model

This model seeks to determine need by measuring differences between current competencies and ideal, desired or required competencies.

- Develop a competency model to identify desirable or required skills
- Measure current performance levels relative to desired ones
- Describe the difference between actual and ideal competencies needed

The next step is to identify needs and to establish priorities. Needs are often ranked in priority by number of persons affected, benefits of improving conditions, costs of resolving the needs, or the ultimate impact of resolving particular needs.

List and Prioritize Objectives

Objectives contribute to the success of a meeting in several ways. They:

- Define parameters, establish direction, give purpose to the meeting
- Provide a basis for potential participants to choose to attend
- Provide basis for determining impact of project through evaluation
- Set realistic expectations for participants

Priorities may be assigned according to the following criteria: mandated responsibilities, target audiences, feasibility, costs, short and long-range benefits to both sponsor and participants, timeliness, political implications, or resource limitations.

Decision-Making

Decisions outlined in this section establish the basis for immediate and future actions. Decisions more closely related to the conference's operation *after* it begins are listed in the Implementation Phase.

Determine Type, Date, Length and Site of Meeting

- Choose the most functional type of meeting based on the primary purpose.
- Give consideration to time and seasonal contraints. Select alternative dates.
- Determine most appropriate length and site after weighing time, travel and economic constraints of participants.

Decisions on length and site are often based on compromises.

Prepare Budget Plan

Plan the budget considering revenues and expenses. A budget checklist follows:

- Opportunities for *revenue* may include:
  - Charges to participants
  - Appropriations from the general fund of an organization
  - Contributions from outside sources
  - Grants from non-profit foundations
  - Contracts with co-sponsoring agencies
  - Fees from exhibitors
- Prior-to-meeting expenses may include:
  - Printing costs
  - Postage
  - Office supplies
  - Material and equipment storage
  - Salaries
  - Travel expenses
  - Telephone messages
- Resource persons and staff expenses may include:
  - Transportation to site
  - Local transportation
  - Other per diem expenses
  - Speaker fees
  - Accommodations
- Facility expenses may include:
  - Meeting rooms
  - Banquet rooms
  - Hospitality suite
  - Meals
  - Coffee break
  - Gratuities
  - Supplies (signs, badges, etc.)
  - Decorations
  - Union fees
  - Storage and handling
  - Equipment operator
  - Electrician and custodian
  - Equipment rental
- Post-conference expenses may include:
  - Printing
  - Postage

Select and Orient Staff

Implementing most conferences and workshops requires staff assistance in addition to planners. Identify coordinating and support needs. Staff members and services that may be needed include:

- Meeting coordinators
- Bonded fee tellers
- Stenographers
- Typists
- Guards
- Bartenders
- Registration clerks
- Copy machine operators
- Switchboard operators
- Equipment operators
- Emergency medical personnel

A general orientation session is helpful. Staff who understand the overall conference intent, process, and leadership can respond more effectively to routine and unexpected demands.

Select and Orient Resource Persons

Selecting a resource person becomes primarily a matter of choosing the person who can best perform the desired role. Other important considerations include availability, fee, reputation, and experience. Not all guest speakers have to be "big names," nor do all resource persons have to present speeches. They may perform other functions better.

The resource person, once selected, needs information to perform his/her role properly. Types of information which can orient the resource person to the meeting include:

- Basic information about the meeting:
  - Time, date, place, purpose of meeting
  - Types and number of participants
  - Nature of sponsoring organization
  - Copy of tentative program
- Information about his/her responsibilities:
  - Type of presentation/help desired
  - Reason for selection
  - Subject to be covered; desired outcomes
  - Common interests of audience
  - Amount of time available
  - Activities following presentation

- Persons to turn to:
  - Contact persons for content questions
  - Contact persons for preparing handouts
  - Contact persons for reimbursements
  - Contact persons for meals and lodging
- Financial arrangements:
  - Travel
  - Per diem
  - Fee or honorarium
  - Method of payment
  - Receipts required
  - Paperwork required
  - Probable payment schedule
- Logistical arrangements:
  - Necessary arrival and departure dates
  - Accommodations
  - Inter-city and local ground transportation

Planners in turn, should secure the following information from resource persons:

- Biographical material:
  - Name, title, and present profession
  - Resume or vita
  - Photograph
- Resource materials:
  - Title and length of presentation
  - Advance copy of speech
- Planning information:
  - Special materials or equipment needs
  - Travel arrangements

Planning Activities and the Agenda

The agenda of events is not just the schedule of the meeting, it *is* the meeting—at the planning stage. Before scheduling anything, compile lists of events or activities that *must* be done. Three lists could be prepared:

- *Logistical activities*—getting the right person together with the right resources in the right place at the right time
- *Learning activities*—helping the participants learn the right things according to your objectives
- *Other activities*—getting participants to complete procedural activities

Some additional tips on fitting various activities/skills/needs with appropriate events follow:

- What is the best order in which to introduce the subject or activity?
- What learning activities are independent?
- How much time is available?
- How much time is needed for each subject or activity?
  - Consider audience ability to concentrate
- Is there an optimal time of day for the activity?
  - When are more active types of activities needed?
  - When will participants benefit from presentations?
- What constraints are imposed by resource persons or availability of physical resources?

The following are some additional suggestions for developing an effective agenda:

- A social hour at the beginning of the conference is beneficial if participants do not know each other. This could be combined with registration.
- Meetings have a greater impact when a few topics are covered in depth.
- Participants gain from having time to discuss, comment, and question after a prepared presentation. Small group sessions may help to facilitate such interaction.
- Break-up sitting and listening activities with more interactive and physical movement activities.
- State both small group and large group activities.
- Use alternate learning strategies for variety.
- Obtain feedback and evaluation from the participants *and use it* to adapt or improve the proceedings.

Plan Promotional Strategies

The following kinds of information are basic to promotional announcements:

- Objectives of the meeting
- Brief description of major topics
- Information as to open enrollment or application screening criteria
- Date and site of meeting
- Contact person for the meeting: address, telephone number
- Registration fees, procedures, times, deadlines
- Accommodation arrangements, rates, procedures, times, deadlines
- Travel and parking information
- Motivational materials such as suggested readings, items to prioritize, or thought-provoking questions

Prepare Evaluation Strategies

Evaluation judges the success of the meeting in terms of participant feeling, the achievement of objectives, or the impact of the program. Decide whether daily feedback will be solicited and used to modify conference proceedings. If so, keep the agenda flexible. Although evaluation is usually treated seriously at the end of a meeting, the strategy for evaluating the meeting along with the appropriate instruments should be built into all aspects of the plans and agenda. See the section on Assessing Impact as well as Chapter Ten for a more specific discussion.

Logistical Arrangements

Suggestions are listed below:

Accommodations and local travel. When overnight accommodations are required, arrangements must be made with local hotels or motels for blocks of rooms. Communicate the arrangements to participants and resource persons. Negotiations for accommodations should consider the following factors:

- Probable numbers of participants' rooms required
- Conference room rates and the period for which they apply
- Probable number of rooms to be held for special guests or officers
- Number of complimentary suites and rooms to be provided

- Billing procedures on room expenses
- Date that uncommitted rooms are to be released

Two approaches might be utilized for coordinating participant accommodations:

- Participants could be provided with direct mail reservation forms.
- Participants could mail all registration forms to project staff, who in turn make reservations at the hotel or motel (not recommended for large groups).

Regardless of approach, provide participants with the following:

- Room sizes and rates
- Reservation procedures
- Deadlines
- Contact name, address, telephone number
- Ground transportation or special conference buses

Facilities. Locate the meeting in facilities of the appropriate quality and size. Colleges and schools, community auditoriums or centers, or hotels or motels may serve as meeting places. The basic types of space that are often needed include: registration space, meeting rooms, banquet room(s), hospitality suite, and exhibit hall. In arranging for the use of particular facilities, consider these factors:

- Correct schedule of room assignments, dates, and times
- Seating capacity and type of seating arrangements required
- Type and quality of lighting
- Public address system required
- Special equipment required and room's capacity for it
- Coordination of room use with building management
- Costs of rooms, equipment, and services
- Time required to set up for meetings
- Availability of soft drinks and coffee machines
- Availability of lounges and restrooms
- Unlocking of rooms, opening and closing of building
- Contact persons for last-minute changes or emergencies

Equipment and materials. Correct equipment and materials must arrive in the right place at the right time. The persons in charge of each of the agenda events (e.g., presentations, registration, site visits) should be contacted to identify their particular needs. Arrangements must then be made to secure the equipment or materials and have them available *in working order* when needed. Equipment is usually rented; reservations should be made well in advance.

The following list of equipment and materials can serve as a basic checklist:

Supplies

Note paper
Binders
Pens or pencils
Marking pens
Transparency marking pens
Stapler
Scissors
Paper clips
Masking tape
Scotch tape
Name tags
Rubber bands
Index cards
File folders
Ruler
Chalk

Audio-Visual Equipment & Supplies

Projection screen
Carousel projector
Film projector
Take-up reel
Extra projector bulb
Extension cord
Adapter plug
Tape recorder
Blank cassette
Batteries
Easel
Flip chart
Chalkboard
Overhead projector
Transparencies
PA system
Microphones
Typewriter
Camera
Videotape recorder
Photo copy services

Prepared Aids

Participant packets
Overhead transparencies
Slides
Flip charts

Furniture

Tables
Chairs
Podium
Stands for AV equipment
Registration table

Replacements for Missing or Broken Equipment or Materials

Supplies
Equipment
Furniture

Displays and exhibits. Gather information about the facilities to help exhibitors make the necessary arrangements. Consider: floor plan and traffic flow, number of exhibits allowed, size limitations, set-up and dismantle dates, electrician and carpenter services, partitions and backdrops needed, security precautions, storage facilities, means of access from outside of building, and costs of labor and other services.

Group meals and refreshments. When meal arrangements are being made for a particular group, attention should be given to several aspects:

- Number of persons to be served, reservation and deposit
- Special menu or orders from standard menu
- Seating arrangements; number at head table
- Costs, including taxes and gratuities
- Method of payment: cash, tickets, charges

- Deadline for payments
- Time required for table set-ups
- Availability of lectern and public address system
- Availability of cocktails
- Contact persons for last-minute changes or problems

Communications throughout meeting. Communication throughout the meeting can be arranged for by:

- Conference telephone desk
- Message board (probably near registration desk)
- Daily bulletins
- Roster of participants with local addresses and telephone numbers

Registration

Since registration is the first contact with each participant, it should be efficient, painless, and informative. Pre-registration by mail greatly facilitates this conference stage. Prepare all name badges and records in advance to reduce staff and participant time required.

Consider the following ideas for well-functioning registration process:

- Welcome or information booth
- Visible, easy to find location
- Adequate number of staff
- Orientation of registration staff
- Necessary registration materials: supplies, packets
- Necessary furniture and equipment: typewriter, cash box, file boxes
- Adequate signs posted for directions
- Friendly, welcoming atmosphere

Implementation Phase

It is during the implementation phase that all plans are put into operation and the meetings are conducted.

Review Plans

Finalize and distribute agenda. Before agendas are mailed to participants or inserted into conference folders, double-check them for accuracy.

- Changes in resource persons, topics, room assignments or schedules
- Sufficient number of breaks
- Adequate lunch time
- Wrap-up and evaluation time provided

Make provision for posting last minute changes in agenda during the conference.

Confirm arrangements with resource persons. Before resource persons arrive, confirm accommodations and transportation arrangements, equipment and material needs. Arrangements for reimbursements and fees and required biographical information should be understood.

Confirm logistical arrangements. All contractual or other agreements should be confirmed to avoid any misunderstandings or surprises, including lodging, local transportation, meeting rooms, registration facilities, equipment rentals and operators, group meals and exhibit area.

Print or acquire materials. Materials which serve as hand-outs for participants or as support materials for staff should be ordered or printed well in advance of the meeting. Time should be allowed for negotiating bids and contracts. Materials frequently used in conferences include:

- Invitation to the meeting
- Flyer or brochure with schedule of events
- Materials for presentations: speeches, case studies
- Evaluation, registration forms
- Signs: registration, daily announcements
- Map of building, city, hotel

Promote event and recruit participants. Efforts to sell the event should be addressed as directly to the target audience as possible and should emphasize how the program will benefit *it.*

Conduct Meetings

Conduct registration. Before registration actually begins, check to insure that:

- Registration desk is well lighted and easily identified.
- Program packets and other materials are available.

- Typewriter, file boxes, pens, and wastebaskets are available.
- Forms are available for registration, receipts.
- Extra tables and materials are available for participants to complete forms.

The registration staff should be fully informed of several aspects of registration.

- Basic and late registration procedure
- Handling cash, checks, or refunds
- Information required for forms or badges
- Procedures and prices for tickets
- Medical emergencies
- Local community and lodging information

Assist resource persons and guests. Resource persons and guests deserve and require special treatment. Considerations include:

- Someone to greet them upon arrival
- Someone to introduce them during special events
- Forms to be completed and signed to *guarantee* their expenses
- Double-checking their last minute equipment and materials needs
- Insuring that they know exactly where to be at what time
- Briefing them on conference progress

Acquire materials and equipment; coordinate use. Assuming that all arrangements were made well in advance, the use of equipment and materials should now be only a matter of distribution. However, something is always in the wrong place or missing. Some precautions include:

- Identify contact person for each type of equipment or material.
- Assemble and check out the equipment in advance.
- Have extra bulbs, batteries, tapes, extension cords available.
- Arrange to have equipment returned on time.

Facilitate group meetings. Even though many meetings are conducted by resource persons, conference planning staff should be available to initiate and help with the meeting. Some staff responsibilities would include:

- Insuring that resource person is in right place at right time
- Briefing resource person on situation and expectations
- Resolving any last minute problems with equipment, etc.
- Preparing audience for resource person
- Intercede at points of conflict to keep program moving

Coordinate displays and exhibits. Conference staff should help keep the following persons accessible to each other: building maintenance, program policy makers, exhibitors, information desk, and security staff.

Monitor Program Operation

Monitoring takes place through solicited feedback from program participants and can result in adapting the program in several ways. Several spects of feedback and adaptation are presented below.

Feedback:

Purpose – to keep planning and coordinating staff aware of the positive and negative things that are happening among participants (and staff members, too).

Methods – informal—staff involvement in all aspects of meeting with verbal or written reports to leadership; constant discussions with key participants or representatives of participant groups; evaluative discussions with guest speakers or discussion leaders; "floating" and listening to comments in meetings and in other places of congregation.

formal—daily questionnaires on the best, worst aspects of the meeting so far . . . administered to participants, leaders, staff; group discussions with participants on how things are going, whether changes should be made in agenda, whether new resources should be brought in, etc.

Adaptation: Follow through . . . change agenda, adding or subtracting time for various items; bring in new resources: persons, materials, agree to provide additional resources (mostly materials), shift emphasis on selected agenda items, e.g., from lecture to group discussion.

Follow-up Activities

After the meeting is over, several activities remain. Example follow-up activities are listed below:

- Maintain communication among participants (roster, newsletter).

- Send thank-you notes to resource persons and special guests.
- Fulfill all financial arrangements and obligations promptly.
- Analyze evaluation results.
- Write and submit a formal report, if applicable.

Assessing Impact

Evaluation

Formative or interim evaluation focuses on factors that can still influence the overall success of the group meeting: participants' perception of conference strengths and weaknesses, the planning and organization of the group meeting, the effectiveness of the speakers and the usefulness and quality of resource or instructional materials used.

These data provide planners with information to alter the remainder of conference activities if necessary. If the meeting is large, then a written evaluation instrument may be used for daily feedback. (See written evaluation instrument in Chapter Ten.) This instrument may be complemented by information observation, i.e., participant attentiveness, notetaking, the question and answer sessions, and by informal feedback from attendees.

The final or summative evaluation will usually take the form of a written instrument but can also be supplemented by informal observations. The final evaluation tries to tap participant opinion of the conference as a whole. In doing so, study the following areas:

- Planning and organization of the group meeting
- Extent to which conference objectives were met
- Usefulness of materials, topic and presentations
- Suggestions for future conferences or workshop improvement

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RESOURCE MATERIALS

The example materials illustrated in this part are designed to be adapted and used selectively as your situation dictates. The purpose of these materials is to show a variety of standard forms, letters, suggested procedures, and other similar aids that would be useful to vocational educators.

List of Illustrations:

- Conference Planning Check List
- Planning by Objectives
- Sample of Daily Evaluation Questions

Title: _____

Dates: _____

Site: _____ # Participants_____

Target Date	Completed	Person Responsible	Item
			1. Determine needs and objectives
			2. Prepare a budget plan
			3. Clearance Procedures
			4. Determine dates of conference
			5. Determine conference site
			6. Determine conference format
			7. Planning by objectives
			8. Facility arrangements
			9. Invitations
			10.Participant transportation
			11.Participant accommodations
			12.Local travel arrangements
			13.Needed staff arrangements
			14.Consultant/speakers
			15.Materials/Audio-visual equipment
			16.Agenda
			17.Promotion
			18.Refreshments/meal
			19.Meal arrangements
			20.Exhibits
			21.Workshop Evaluation
			22.Follow-up letters
			23.Final Report

Conference Planning Check List

Planning by Objectives

Need _____

Objective _____

Target Group _____

Type of Activity	Facilitator/ Consultants Required	Staff Required	Supplies Needed	AV Equipment	Evaluation	Time	Facilities/ Location	Cost

Sample of Daily Evaluation Questions

Date _____

1. What were the two best aspects of today's activities?

   a.

   b.

2. What two aspects of today's program (instructional format, content, environment, etc.) most need to be improved for tomorrow's sessions?

   a.

   b.

3. What new terms or concepts (if any) presented during today's session need further explanations?

Any additional comments you would like to make on the back of this sheet will be greatly appreciated.

Thank you!

Sample of Daily Evaluation Questions

CHAPTER 3

COOPERATIVE INTERNSHIPS
Contributions to Staff Development

Introduction

Rationale

The rapidity with which technologies in business and industry are continually changing requires that vocational educators keep in close contact with practitioners in their field and with the work environment for which they are preparing workers. One of the very effective vehicles for keeping technical knowledge and skill up to date is the cooperative internship. This is effective on two levels:

1. Through cooperative internship courses at the university which provide supervised employment-learning-earning experiences for both experienced teachers and those preparing to teach

2. Through cooperative education courses in the schools which enable the teacher-coordinators to visit the workplace of their technical area in business or industry and to interact with people there

Benefits

There are significant benefits to vocational teachers and administrators and those preparing to teach who either enroll as interns in a cooperative program at the university, or who supervise or teach in cooperative education programs in secondary school or two-year colleges.

The cooperative internship courses at the university may be either at the undergraduate or graduate level. They are designed to provide a meaningful level of employment in the enrollee's technical field, to refresh skills, to update technical knowledge, and to establish contacts in one's technical area. These courses often meet the certification requirements of vocational teachers or coordinators of cooperative programs.

The cooperative education coordinators in secondary schools and two-year colleges place students in positions in business and industry and coordinate the students' on-the-job and in-school experiences. This requires their frequent contact with persons in business management, personnel departments, and first-line supervisors. The coordinators visit the place of business to observe the students and talk with their supervisors. This interaction helps keep the coordinator's knowledge current.

The following list identifies benefits to be derived from this interaction with business and industry for the professional development of the teacher-coordinator. The same benefits are true for teachers enrolled in cooperative internship courses at a university. Possible benefits include:

- Refreshing, developing, and updating skills
- Bringing technical knowledge up to date
- Working with the latest equipment
- Developing and establishing contacts for placing interns and graduates
- Establishing contacts for resource speakers and advisory committee members
- Meeting certification requirements
- Earning while learning for both inservice and preservice teachers
- Providing illustrations, anecdotes, and cases-in-point for teachers to use in their presentations to students
- Providing firsthand experience of the skills required for workers

Planning Procedures

After the need has been ascertained and the benefits identified, other information must be gathered. Careful planning will enable building a sound program. The following items need to be considered in planning for a cooperative internship program:

- Identify needs and benefits
- Assess whether your community offers a sufficient number of training sites
- Check policy and procedures of department and/or institution approval
- Secure approval
- Check state education agency regarding regulations and requirements
- Get commitment of financial resources to conduct program
- Establish advisory committee

Available Training Sites

Determine whether the community or local area has enough possible training sites to conduct the internship. Site availability depends upon the size of the town or city and the kind of job needed.

Policy and Procedures of Department and Institution

In planning to establish a cooperative education program in your department, the policies and procedures of your institution must be examined and followed. These will include such policy and procedures as:

- Institutional procedures for approval of a new course or program
- The state education agency requirements in creating a cooperative program
- Funding procedures
- Union requirements (if applicable)
- Certification requirements (if applicable)
- Coverage required for liability, accident, and medical

The opinions, recommendations, and support of other faculty members in the department are very important in the formative stages. Administrative support and approval are necessary to begin the program.

Commitment of Financial Resources

The school must be financially able and agree to provide funds to hire a qualified coordinator. This must include time for promotion of program, placement of interns, supervision of interns, and evaluation of program. Funding also must provide for whatever related classes the state education agency requires.

An adequate source of continuous funding must be established for the operation of the internship program. This budget must cover the costs of:

- An internship coordinator
- Time required to place interns
- Recruitment and counseling of interns
- Time required for supervision and coordination
- Secretarial services
- Office supplies
- Promotion
- Travel to site (often reimbursed by state)
- Telephone service
- Teaching related classes

Compensation or Financial Assistance for Interns

Interns who work in business and industry should be paid by that business or industrial organization for work performed. Payment can be regular salary, hourly wages, or a special fellowship or scholarship.

Select Internship Teacher-Coordinator

The teacher-coordinator is the key to a successful cooperative internship program. The coordinator should have a meaningful level and length of work experience in business or industry in his/her technical field, as well as preparation and teaching experience in his/her area of expertise. It is important that he/she works well with a wide variety of people in order to recruit interns and to attract employers to participate in the program. He/she should be skilled in promotion and public relations in order to get school and community support and participation. In summary, the teacher-coordinator should have the following attributes:

- Preparation, knowledge, and skill in his/her occupational area
- Employment experience in technical field
- Successful teaching experience
- Background in coordination techniques
- Good human relations skills
- Contacts with prospective employees and employers
- Promotional skills

Advisory Committee

The existing departmental advisory committee can be used in the cooperative internship program or a separate advisory committee can be organized to aid in planning, implementing, and evaluating the program. In selecting committee members for the cooperative program, consider their ability to help the coordinator in securing participating employers. For more information about advisory committees, please refer to the section in this handbook on that topic.

Planning Checklist

- ☐ Identify needs and benefits
- ☐ Ascertain sufficient supply of training sites
- ☐ Determine faculty and administration support
- ☐ Get institutional approval for new programs

- ☐ Check requirements and regulations of state department of education
- ☐ Get financial resource commitment and budget approval
- ☐ Select internship coordinator
- ☐ Confirm advisory committee members

Implementation

After the basic planning has been done and official approval received, action to implement the cooperative internship begins.

Publicize Program in the Community

Creating community awareness of the cooperative internship program is an important step in launching the program. The objectives of the program and its benefits to students, employers, and the community need to be communicated. This should be done enough in advance to get in the school bulletin and course catalog.

Good advertising and publicity must preceed the program by several months in order to assure a healthy pool of both potential interns and training stations (employers). News releases need to be prepared for local newspapers and magazines. The coordinator should seek time on local television and radio shows. Appropriate professional organizations and trade associations are prime audiences to tell about the program as members will continue to spread the word. Faculty meetings and student organizations and groups should be given the information through presentations, brochures, and articles in internal publications. Potential employers should be contacted.

In summary, the following methods can be used to publicize the program:

- Prepare a pamphlet or brochure describing the program
- Circulate information on the program to faculty and staff
- Write an article for the school newspaper
- Have information prepared in advance for the school bulletin and course catalog
- Speak to faculty groups and student organizations
- Contact potential employers
- Appear on local television and radio shows
- Write articles for local newspapers and magazines
- Speak to professional organizations and trade associations

Build Contacts with Potential Employers of Interns

A time-consuming aspect of establishing a cooperative internship program is locating and developing good training stations. Potential intern employers must understand both the educational objectives of the program and the benefits to participating employers.

Set Up Criteria for Internship

Establish the criteria that applicants must meet in order to qualify for the internship.

Application for Internship

Once potential interns have been contacted, they should fill out an application form and submit it to the coordinator.

The applicant should provide the following information:

- Name, address, phone
- Present position, if employed
- Past work experience
- Education completed
- Skill and knowledge competency
- Career objective
- Position desired
- Reason for wanting to participate in program
- Other pertinent data

A sample Application for Internship is included in the Resource Materials in this section.

Interview Applicants

The next step in the selection process is to interview applicants. This should be done by the coordinator or a selection committee appointed by the coordinator. The interview provides the opportunity to look further into information provided on the application, to assess the applicant's personal qualities, and the applicant's human relation skills.

Select Interns

After all the applicants have been interviewed, the coordinator and/or selection committee will then accept the candidates who qualify for the program, limited by the number of students the program can accommodate. The size of the group depends on staff availability, stipend funds, number of training stations, and travel to the internship site.

Consider an applicant's qualifications and his/her potential for benefiting from the internship experience in the final selection. In addition, the following aspects deserve prime consideration:

- Desire to acquire additional competencies
- Previous knowledge/skill that will facilitate applicant's entry into his/her area of interest
- Positive concern for developing and improving programs in vocational education
- Part of a required training or degree program

Locating and Selecting Training Stations

Once the candidates have been accepted and an assessment of their skills and internship needs determined, potential employers who can provide suitable training stations should be contacted to interview appropriate interns. This matching of intern with internship employer is a critical part of the process. A good matching enables a successful experience for all; an inappropriate matching often creates many problems. It is usually advisable to have a prospective employer interview two or three internship candidates the coordinator chooses and have the employer then select the inter-employee he/she wants. This interview procedure gives the employer some real input in the selection process.

Interns may individually locate appropriate training stations or put the coordinator in touch with personal contacts. A final assessment and approval of such a training station, however, should be made by the coordinator. The program or department advisory committee also can be a valuable source of assistance.

The following guidelines can help evaluation potential training stations:

- The setting must be able to provide experiences needed by the intern.
- The location must be able to provide a wide spectrum of experiences.
- The employer's top management must endorse the program.
- The employer must be able to provide a supervisor willing to accept responsibility for the intern.
- The employer must be able to provide necessary work hours for the intern and provide safe working conditions.
- The setting exposes the intern to the latest developmens in the field.

Internship Agreement

To help insure that all parties understand the objectives of the program and what their respective responsibilities are, the coordinator should prepare a written agreement to be signed by the employer, the intern, and the coordinator as the representative of the school. This agreement would not be a binding legal contract, but rather a statement of understanding. The agreement should contain such items as statement of educational purpose, responsibilities of each party, work hours (daily and/or weekly), length of internship, title of position, and amount of compensation.

The Resource Materials in this section contain some sample Internship Agreements.

Individualized Training Plan

After the internship agreement has been signed and before the intern begins work, the employer, on-the-job supervisor, intern, and coordinator (or at least the employer and the coordinator) should sit down together a develop a step-by-step training plan. This should include a job description, the major areas of experience to be gained, a breakdown of tasks involved in these experience areas, and the approximate length of time to be spent in each skill area. A sample form of a training plan is included in Resource Materials in this section.

An important function of the individualized training plan is to secure the commitment of the employer to provide a growing, learning experience for the intern. It also helps to insure that the intern's objectives for participating in the work experience are met.

Forms Recording Internship Experience

Forms should be provided for the intern, coordinator, and employer which provide both a record of the work experience and an evaluation. These forms are:

- Weekly Job Report (Intern)
- Visitation Record (Coordinator)
- Evaluation of Intern (Employer)

Samples of such forms are in the Resource Materials in this section.

Weekly Job Report. The intern should maintain a record of the activities he/she has performed on the job, what he/she has learned from this work experience, problems encountered, and what help or additional information he/she needs to perform better or move into new areas of responsibility.

Visitation Record. The coordinator should keep a record of his/her observations when visiting the intern at the training station. Information on the form can be selected from the following items:

- Name of intern
- Name of employer

- Date and time of visit
- Length of visit
- Whether training plan was discussed
- Atmosphere of office or work environment
- Attitude of other employees toward intern
- Efficiency or lack of in work place
- Appearance of intern
- What intern was doing
- Conference with supervisor
  - Strong and weak points of intern
  - Mistakes he/she has made
  - Quality of work
  - Use of time
  - Working relationships
  - New activities to be undertaken

The coordinator should make an appointment for the visit with the employer or supervisor. When at the training station, the coordinator should have specific topics he/she wishes to discuss with the employer/supervisor and not take more of the employer's time than is necessary. He/she should also talk with the intern and observe him/her on the job.

Evaluation of Intern's Performance. Once or twice during the grading period the employer should fill out the required form to evaluate the intern's performance. The form can provide both rating scales to measure performance on specified aspects and sections for open comments. Suggested aspects for evaluation are:

- Skills
- Production rate
- Quality of work
- Human relations
- Appearance
- Attendance
- Promptness
- Speech
- Initiative
- Judgment

The employer and coordinator then mutually decide on the intern's grade.

Information culled from these three forms (Weekly Job Reports, Visitation Record, and *Evaluation of Intern) helps evaluate the quality of the internship both during the training period* (formative) and at its conclusion (summative). Using both time frames makes it possible to identify problems while they can still be corrected and makes the final evaluation easier.

Assessing Impact

Final Evaluation of the Internship Program

Final or follow-up evaluation of the quality of an internship should focus on how well the objectives of the individual cooperative education program were met. Assessment could consider:

- The number of persons who continued working in training-related fields
- The number of persons pursuing advanced education in the internship field at the conclusion of the cooperative internship program
- The usefulness of the experience for teachers once they begin teaching in cooperative internship programs
- The management of the cooperative internship

In both interim and final evaluations, the Weekly Job Report and the Visitation Record provide the basic data to determine if the program if fulfilling its objectives. The employer's assessment of how well the intern matched his/her training site and job needs should also be considered in the final evaluation. In addition, the institution should evaluate:

- procedures for screening and selecting applicants
- procedures for selecting internship sites
- procedures for matching interns and internship sites

Unsuitable techniques and/or internship sites should be noted and dropped from program procedures and/or reference files.

Designing Evaluation Instruments

The following form is designed for the intern to complete. However, it may be adapted for the supervisor to complete (e.g., replace section on "Quality of the Internship Site" with "Quality of the Relationship with the Institution").

Suggested Form

Please respond to the following items by circling the appropriate letter which best reflects your opinion regarding the cooperative internship program.

QUALITY OF THE INTERNSHIP SITE	Definitely No				Definitely Yes
1. I was pleased with the site to which I was assigned.	A	B	C	D	E
2. I was pleased with the attitude of the staff at the site toward me.	A	B	C	D	E

Comments: _____

_____

QUALITY OF THE INTERNSHIP EXPERIENCE					
1. The internship experience met my expectations.	A	B	C	D	E
2. The internship was a useful experience for me.	A	B	C	D	E
3. My skills were sharpened as a result of the internship.	A	B	C	D	E

Comments: _____

_____

QUALITY OF THE INTERNSHIP SUPERVISOR					
1. My supervisor was available whenever I needed him/her.	A	B	C	D	E
2. My supervisor spent what I consider to be an adequate amount of time with me.	A	B	C	D	E
3. My supervisor assisted me when any problems arose.	A	B	C	D	E

Comments: _____

_____

OVERALL	Poor	Fair	Average	Good	Excellent
1. The quality of the internship site was:	A	B	C	D	E
2. The quality of the internship experience was:	A	B	C	D	E
3. The quality of the internship supervision was:	A	B	C	D	E

Follow-up Techniques

The program may decide to use follow-up techniques as a method of summative evaluation. (See Chapter 10 for more background on Evaluation Instruments and Theory.) If so chosen, a system would be designed to query program participants in order to capture retention rates and usefulness of the experience. This may be done periodically following a participant's completion of the program. The timing of follow-up activities would depend upon the use to be made of the data in program planning and fiscal resources. A sample format to collect follow-up information appears below:

FORMAT

_____ *(Institution)* _____ is collecting information about the Cooperative Internship Program in order to improve the program for future participants. In order to do this, we need your help. Please take about five minutes to complete this form. All data will be confidential. Thank you for your cooperation.

1. In what field was your cooperative internship? (Note: Response may be open-ended *or* you may list a series of fields and have the respondent check the appropriate one.)

2. In what field are you currently working? (See No. 1 for types of responses.)

3. Do you feel the cooperative internship experience was useful? _____

   Why? _____

   _____

4. What specific areas or skills obtained as a result of the cooperative internship program are most useful to you in your teaching? _____

   _____

5. On reflection, what aspects of the cooperative internship program were the:

   a. Stronger features? _____

   _____

   b. Weaker features? _____

   _____

6. Additional Comments: _____

   _____

   _____

Thank you for your help!

Implementation Checklist

- ☐ Publicize program in the community
- ☐ Build contacts with potential employers of interns
- ☐ Set up criteria for internship
- ☐ Design internship application form
- ☐ Receive applications
- ☐ Interview applicants
- ☐ Select interns
- ☐ Locate and select training sites
- ☐ Set conditions for financial compensation and time schedules for internships
- ☐ Send interns out for interviews with potential employers
- ☐ Make out an internship agreement and have signed by employer, intern, and coordinator
- ☐ Develop internship training plans
- ☐ Orient intern and sponsor
- ☐ Design reporting forms on internship: Weekly Job Report, Visitation Record, Intern Evaluation Form
- ☐ Supervise and coordinate internship activities
- ☐ Evaluate internship experiences
- ☐ Grant credit for internship
- ☐ Follow-up study to evaluate program effectiveness

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RESOURCE MATERIALS

The example materials illustrated in this part are designed to be adapted and used selectively as your situation dictates. The purpose of these materials is to show a variety of standard forms, letters, suggested procedures, and other similar aids that would be useful to vocational educators.

List of Illustrations:

- Internship Information Sheet
- Internship Application
- Sample Work Agreement
- Sample Intern Assignment Description
- Internship Training Plan
- Visitation Record (Coordinator)
- Weekly Job Report
- Sample Secretarial Internship Evaluation Form
- Participant Program Evaluation
- Employer Evaluation of Intern
- Internship Program Participant Follow-up

(Name of University)

(Department Title)

STATE PROFESSIONAL DEVELOPMENT PROGRAM INTERNSHIP

A continuation of the INTERNSHIP PROGRAM with (state name) and EPDA support provides opportunities for interested individuals to participate during (date).

PARTICIPANT CLASSIFICATIONS: This proposal provides for four different groups to participate:

A. GRADUATE STUDENTS — Individuals preparing for positions as leaders in administration, curriculum development, career education.

B. UNDERGRADUATE STUDENTS — Individuals needing additional work experiences in industry, business, or agriculture.

C. VOCATIONAL TEACHERS — Persons desiring updating experiences in industry, business, or agriculture.

D. POTENTIAL — Individuals from industry, business, or agriculture desiring to teach in vocational and/or technical education.

ACTIVITIES: An approved, coordinated, and supervised work internship program will be planned for individuals in accordance with the above classifications.

LENGTH OF INTERNSHIPS: Each internship will be planned for a university quarter (approximately __ weeks). As much as possible this will be scheduled to coincide with calendars established for individuals in participating institutions.

CREDITS: (#) credits may be earned for successful completion of the internship in (VE 593, number and title of course INTERNSHIP IN VOCATIONAL EDUCATION). This course may be either undergraduate or graduate credit.

Participants will maintain a daily diary and make other reports.

STIPEND: A stipend of ($) will be provided for individuals who complete the program.

APPLICATION: Contact for application form or additional information:

(Name of Contact)
(Address)

Internship Information Sheet

(Name of University)

(Department Title)

STATE PROFESSIONAL DEVELOPMENT PROGRAM INTERNSHIP

APPLICATION

1. Name of Applicant: Mr. Mrs. Miss _____
(Last) (First) (Middle)

2. Age _____ Date of Birth _____ Social Security No. _____

3. Home Address:
Street: _____ City _____
State: _____ Zip Code _____ Telephone Number _____

4. Present: _____ Employer (or) ____ Educational Institution (Complete below):

Name (Employer or school) _____

Street _____ City _____

State _____ Zip Code _____ Telephone Number _____

5. Title of present position (or student classification) _____

6. Education (List most recent first, indicate others in descending order).

Institution	Address	Degree or Diploma	Year Received	Major Field

7. Work Experience (List most recent or most applicable first).

Position	Address	City	State	No. of Years

8. Briefly indicate why you are interested in participating in this internship program. Relate your personal objectives to possible participation in this program.

_____

Internship Application

9. If selected, would you be able to participate for an eleven-week period?

Yes ____ No ____

Prefer: Fall Quarter ____ Winter Quarter ____
Spring Quarter ____ Summer Quarter ____

Other 11 week period (Indicate) _____ to _____.

10. I have been admitted to (name of university) Yes ____ No ____
Degree sought or immediate goal _____
Program _____

11. I plan to apply for admission to (name of university) Yes ____ No ____
Program _____

12. I have a vocational credential valid in (state) Yes ____ No ____
Other state: _____
I am applying for a credential in (state) Yes ____ No ____

13. My service area is _____

14. Other significant information:

_____

_____

_____

_____

_____

_____

15. Reference: (List three)

NAME	ADDRESS	TELEPHONE NUMBER

Date _____ Signature: _____

NOTE:
Attach a copy of transcript of institutions attended and resume (if available).

If additional space is desired for any of the numbered items, complete on the reverse side, identifying with the number of the items.

Internship Application (Continued)

(Name of University)

(Department Title)

STATE PROFESSIONAL DEVELOPMENT
PROGRAM INTERNSHIP

AGREEMENT

State Professional Development Program Internship

Preamble:

(Name of University) thrcugh its (department title) and in cooperation with the State Board for Community Colleges and Occupational Education, and the Office of Education, U.S. Department of Health, Education, and Welfare, is undertaking a pilot internship program for the training, exchange and transition of Vocational Education and business, industry, agricultural and government personnel. An exchange of personnel, on a carefully planned structured program, will improve communications, enhance educational personnel and strengthen industry's present and future employees. The pilot internship will help immeasurably to develop and refine essential methodology, gather data and formulate operational guidelines for later expanded programs of internship.

Agreement:

Sponsor: The industry, agency, institution or district, hereafter called the sponsor, shall provide opportunity for learning under supervision, in accordance with the program assignment which is attached to this agreement and which is developed and agreed to by all parties.

Intern: The intern shall perform the work assignment on the job as a professional, devoting full time to the duties, according to the policies and regulations of the sponsor-employer and his functional assignment. The intern will assume the duties assigned as detailed in the agreement. He shall help develop the program assignment and advise as to program revisions during and after the internship.

University: The University shall coordinate the learning experiences of the intern with the program opportunities provided by the sponsor. The university, in cooperation with the intern and the sponsor, will develop the program assignment. It shall also maintain an on-going evaluation through observation, reports and consultation with the intern and supervisor(s) to continually be alert to changes or needs that will make the program and learning process as effective as possible. The university will also award (#) hours college credit to the intern who successfully completes the requirements of the eleven week internship.

Sample Work Agreement

Payments

The intern, who is a full-time student prior to the beginning of the internship, shall receive a stipend of (dollar amount) as identified in the grant agreement with the university. Payments shall be made _____ _____ to help cover expenses coincident with fulfilling this internship.

Any compensation other than as indicated above constitutes a separate agreement between the intern and the sponsor. The university shall be informed of the provisions of such agreement.

The intern, who is employed full-time in the industry-education exhange program, shall also receive a stipend of (dollar amount) as specified in the grant agreement with the university. Each individual shall continue to receive such compensation as has been agreed to by the original employer.

Summary:

It is further understood and agreed that many details which are inherent to a program of pilot internship of vocational education can not be entirely foreseen. Each party, in cooperation with the other parties, will give his best efforts in review and make decisions to afford the best methods of handling these details as they arise.

For the Sponsor _____

Date _____

_____

Title _____

Intern _____

Date _____

_____
(address)

For the University _____

Date _____

Title _____

"Discrimination based solely upon race, color, creed, sex, or national origin and which is without appropriate basis of distinction is contrary to the purposes and policies of the University and violates the spirit and intent of civil rights laws of (state)."

Sample Work Agreement (Continued)

(Department Title)

(Name of University)

(Address)

INTERN ASSIGNMENT DESCRIPTION

Student's Name _____ Phone ( ) _____
Last First Middle

Internship Mailing Address _____
Street City State Zip

Student's Social Security Number _____

Program _____

Employer Name _____ Phone ( ) _____

Address _____
Street City State Zip

Name of Supervisor _____ Title _____

Dates of Employment _____ to _____

Activities in which student will participate (use extra page if necessary)

_____

_____

_____

Daily hours of work _____ a.m. to _____ p.m. Day per week _____

Remuneration employer is to pay this student _____ per hr. wk. mo.

Other Information _____

On back, diagram a simple map showing location of employer, street names and distance on the main highways.

The undersigned agree to conform with this agreement and two weeks notice must be given to all parties before this agreement is terminated.

Signed: Approved by Employer _____ Date _____

Approved by Student Intern _____ Date _____

Approved by Coordinating Teacher _____ Date _____

Approved by Dept. Coordinator _____ Date _____

Sample Intern Assignment Description

INTERNSHIP TRAINING PLAN

A. Title of job: _____

B. Position description:

C. Name and address of training station: _____

_____ Phone: _____

D. Areas of experience and training for internship:

1. 4.

2. 5.

3. 6.

E. Tasks involved in these areas of experience:

1. 4.

a. a.

b. b.

c. c.

d. d.

2. 5.

a. a.

b. b.

c. c.

d. d.

3. 6.

a. a.

b. b.

c. c.

d. d.

F. Name of job supervisor: _____

Internship Training Plan

(Name of University)

(Department Title)

STATE PROFESSIONAL DEVELOPMENT
PROGRAM INTERSHIP

PROGRAM COORDINATORS SITE VISIT REPORT

Student's Name _____ Assignment _____

Institution _____ Address _____

Supervisor _____ Title _____

	Yes	No	Don't Know
1. Is he given the responsibility he seeks?			
2. Is he aware of the skills and abilities needed for the role he seeks?			

3. Intern's opinion of his progress. _____

_____

_____

_____

4. Coordinator's opinion of his progress. _____

_____

	Yes	No	Don't Know
5. Is the supervisor satisfied with his progress?			
6. Is the intern succeeding in his objectives?			
7. Does he offer constructive ideas to his supervisor?			
8. Does he understand the duties of his supervisor and others to whom he is assigned?			
9. Is he positive toward his training assignment?			
10. Does he readily accept suggestions from others?			
11. Does he exercise initiative to learn more than his assignment requires?			

Visitation Record (Coordinator)

12. Is he punctual in his attendance on the job?

13. Is his appearance and dress in keeping with his associates?

14. Are his relations with fellow employees satisfying and personal?

15. Does his supervisor seem very willing to assist in his progress?

Visitation Record (Coordinator) (Continued)

Coordinator's initials: _____

SECRETARIAL SCIENCE INTERNSHIP
WEEKLY JOB REPORT

Intern: _____ For week ending: _____

1. What were your responsibilities or activities on the job this week?

Responsibility or Job Assignment	Percentage of Time Spent
a. _____	_____
b. _____	_____
c. _____	_____
d. _____	_____
e. _____	_____
f. _____	_____

2. What new knowledge, skill, or insight did you learn on the job? Describe.

_____

_____

_____

3. What difficulty occurred or what mistake did you make on the job? What did you do to correct it?

_____

_____

_____

4. On what skill or question could you use help in performing your job better?

_____

_____

5. What interesting or challenging relationship did you have this week with a fellow worker, a client, your supervisor or employer? Describe.

_____

_____

_____

6. What did you learn by observing others this week? _____

_____

_____

Weekly Job Report

SECRETARIAL INTERNSHIP EVALUATION FORM

Secretarial Intern _____ Office _____ Date ____

Note to job supervisor: Your checking of this short evaluation sheet will assist the coordinator of the secretarial internship program in helping the student to become a better secretary.

Please check in the right hand columns your impression of the following, omitting points that do not apply to the activities performed by the student:

	Unsatis-factory	Poor	Average	Above Average	Superior
SKILLS:					
Typewriting					
Shorthand					
Record Keeping					
Filing					
Machine duplication					
Proofreading					
Machine transcription ..					
PRODUCTION:					
Volume of work					
Quality of work					
Steadiness					
FUNDAMENTALS:					
Handwriting					
Spelling					
Arithmetic					
BUSINESS TECHNIQUES:	ABILITY TO				
Meet people					
Work harmoniously with others					
Use office telephone					
Follow instructions					
Handle supplies efficiently					
PERSONAL TRAITS:					
Enthusiasm					
Appearance					
Manners					
Health					
Personal Hygiene					
Speech					
Initiative					
Tact					
Accuracy					
Judgment					
Patience					

Sample Secretarial Internship Evaluation Form

	Unsatis-factory	Poor	Average	Above Average	Superior
Self-Confidence	_____	____	_____	_____	_____
Attendance	_____	____	_____	_____	_____
Promptness	_____	____	_____	_____	_____

OTHER COMMENTS: (Unusual strengths and weaknesses) _____

_____

_____

_____

_____

_____

_____

Suggested Grade _____

_____
Signature

Sample Secretarial Internship Evaluation Form (Continued)

(Name of University)

(Department Title)

STAFF PROFESSIONAL DEVELOPMENT
PROGRAM INTERNSHIP

PARTICIPANT PROGRAM EVALUATION

(Read each question carefully and check the answer that most nearly expresses your feelings. If you check "undecided" it will mean you have no opinion. Where asked why, please amplify on your opinion).

	Strongly Agree	Agree	Undecided	Disagree	Strongly Disagree
1. The program assignment was properly planned with adequate time allowed to complete it.					
2. I succeeded with my original objectives for the internship.					
3. My future plans have changed as a result of this internship. Why? _____					
4. Routine and special tasks assigned by my supervisor were completed to my satisfaction.					
5. I gained valuable experiences not available in the classroom.					
6. The internship was less educational than expected.					
7. The organizational structure of my assigned industry, agency or institution is clear to me.					
8. Because of this internship, I can make a more meaningful contribution to a future job. Why? _____					
9. A different placement would have been more worthwhile.					
10. I was readily accepted as "part of the team" in my assigned organization.					
11. More responsibility would have been desirable. Why? _____					

Participant Program Evaluation

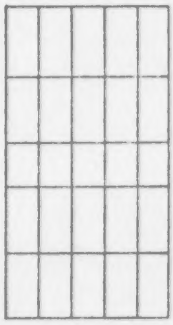
12. "Feedback" to University personnel was adequate to handle any problems that arose.

13. My supervisor was helpful, cooperative, and interested in making this a useful learning experience.

14. Others within the organization were helpful.

15. Persons contacted outside this organization added much to this experience.

16. This type of organization is one in which I would be proud to serve.



Why? _____

_____

17. Considering the previous sixteen statements and other information you have gained during your internship, please comment on any part of your experience that was meaningful to you and how this program could be strengthened to benefit others. (Continue on the back of this page if necessary).

_____

_____

_____

_____

_____

_____

_____

_____

_____ _____

Date Intern

Participant Program Evaluation (Continued)

(Department Title)
(Name of University)
(Address)

EMPLOYER EVALUATION OF INTERN

Employer: Please return this form in the attached envelope.

Student Intern's Name: _____

Please rate the intern on characteristics listed below. Check the appropriate space indicating your evaluation of the student to date.

	Superior	Good	Average	Fair	Poor
1. Punctuality					
2. Willingness to learn					
3. Dependability					
4. Thoroughness of work					
5. Acceptance of constructive criticism					
6. Personal appearance					
7. Cooperation with fellow workers					
8. Work speed					
9. Responsibility					
10. Acceptance by supervisors					
11. Acceptance by others					
12. Technical competence					

13. Other comments _____

_____

Date _____

Firm's Name _____ Address _____

Signature _____ Address _____

Employer Evaluation of Intern

(Name of University)

(Department Title)

STATE PROFESSIONAL DEVELOPMENT PROGRAM
INTERNSHIP

INTERNSHIP PROGRAM PARTICIPANT FOLLOW-UP

INSTRUCTIONS: Please respond to each item by checking the response you feel is most appropriate for each item. NA (not applicable) may be checked if you are a full-time student. Disregard the numbering system in parentheses which is for tabulating purposes.

1. Current position in vocational and technical education.

   ( ) a. Full-time teaching
   ( ) b. Administration and supervision
   ( ) c. Education training in business or industry
   ( ) d. Unrelated to vocational and technical education
   ( ) e. Other (please detail) _____

2. Are you employed (or were you employed following your internship) in a position similar to or related to your internship?

   ( ) a. Yes
   ( ) b. NA
   ( ) c. No

3. Is your present position (or any subsequent position) within the same firm, agency, or institution in which you interned?

   ( ) a. Yes
   ( ) b. NA
   ( ) c. No

   If YES, do you feel it was a result of the internship?

   ( ) a. Yes
   ( ) b. NA
   ( ) c. No

4. If your position has changed since your internship, did the internship afford you personal contacts leading to your present position or to subsequent positions?

   ( ) a. Yes
   ( ) b. NA
   ( ) c. No
   ( ) d. Position is unchanged

Internship Program Participant Follow-up

5. Considering the position you now hold (or positions held following your internship), how would you rate the overall experience gained from your internship?

( ) a. Very much related to my later position(s).
( ) b. Related, but not applicable less than 50% of the time.
( ) c. Valuable, but not related to my position(s).
( ) d. Of little or no present value.
( ) e. NA

6. Please rate the knowledge gained by you during the internship that assists you in problem solving at your present position or in involvements since your internship.

( ) a. Very useable in many situations.
( ) b. Useable in some situations.
( ) c. Seldom useable.
( ) d. Of no benefit.

7. Considering your formal college classroom instruction versus your internship experiences, what percentage of the experiences were meaningful reinforcement of your classroom instruction?

( ) a. None
( ) b. 10%
( ) c. 20%
( ) d. 30%
( ) e. 40% or more

8. Considering your formal college classroom instruction versus your internship experiences, what percentage of the experiences were not duplicated in the classroom?

( ) a. 100%
( ) b. 75%
( ) c. 50%
( ) d. 25%
( ) e. None

9. Because of your internship experiences, do you now see for yourself future implications for the following:

A salary increase?

( ) a. Yes
( ) b. No

An advancement in position?

( ) a. Yes
( ) b. No

Increased performance on the job?

( ) a. Yes
( ) b. No

Internship Program Participant Follow-up (Continued)

10. In retrospect, has your attitude of personal gain toward your internship changed during the intervening time?

( ) a. Yes
( ) b. No

Please comment _____

_____

_____

_____

11. Would you recommend to others the internship method of gaining new educational experiences?

( ) a. Yes
( ) b. No

Why? _____

_____

_____

12. Your comments about the internship are earnestly solicited and will be much appreciated. You might reflect on how you could be better prepared for the internship, what courses could be offered that would re-enforce the internship experiences, needless duplication that occurred between the classroom and internship, more credit hours for the internship, or any subject you deem important to improve the internship.

_____

_____

_____

_____

_____

(If you desire, make additional comments on the back of this page.)

Thank you for your cooperation. Please return this form in the self-addressed stamped envelope to:

(Contact Name)
(Name of University)
(Address)

Internship Program Participant Follow-up (Continued)

CHAPTER 4

STRUCTURED OCCUPATIONAL EXPERIENCES
Establishing Structured Occupational Experiences Involving Business, Industry, and Labor

Introduction

Rationale

Education and the world of work have for years been artifically separated. Today, more than ever, it has become urgent to bring together these two vital areas of life. Both worlds have too much in common to act independently and much to gain from cooperation.

In this space-age era, all vocational educators should possess occupational competence and regularly be given opportunities to keep abreast of change in their particular field. Their experiences and knowledge affect not only our educational programs but also our future manpower.

One method to achieve this competence is structured occupational experiences. These flexible experiences create an effective vehicle for two-way communication. Further, this approach could offer concerned individuals (vocational instructors, administrators) a number of methods by which they can continually update their skills.

Benefits

A structured occupational experience:

- Upgrades teacher understanding of new developments
- Provides associations with counterparts in business/industry/labor
- Permits participants firsthand observation of new work procedures, processes, and mechanisms
- Allows participants to establish a closer working relationship with business/industry/labor and other institutions
- Broadens the work experience of pre- and in-service personnel which may be uneven and/or limited
- Permits observation of procedures which may result in improved management practices in the institution

- Provides information to update school programs so that school training reflects the current needs of business and industry
- Provides participants with on-the-job training
- Promotes business-industry-labor and vocational education ties

Planning

Model Procedures

A model procedure for establishing structured occupational experiences as part of an institution's staff development program will be described. The model procedure may be composed of the following basic elements:

- Staff development committee
- Application for a structured occupational experience
- Assessment of competence
- Professional development plan
- Applications review committee
- Identification and evaluation of potential training aids
- Evaluation of the structured occupational experience
- Credit for the structured occupational experience

Staff Development Committee

A staff development committee is an asset to any structured occupational experience. Existing department/institutional advisory committees can be utilized in the structured occupational experience or a special advisory committee can be organized to aid in planning, implementing, and evaluating the program.

When a decision is made to use a special staff development committee, then a number of elements must be considered:

- Determine a workable committee size
- Nominate individuals with expertise in related fields
- Determine length of appointment
- Determine the number of committee meetings to be held
- Determine the role of the staff development committee

Committee members involved in such a program can help in many ways. The following list suggests possible roles:

- Encourage the cooperation of business, industry, and labor for providing potential experiences
- Assist in the identification of potential work sites
- Review submitted training plans
- Make suggestions for improving the structured occupational experience program
- React to issues and concerns regarding the operation of the program
- React to concepts and practices proposed regarding the structural occupational experience program

This approach has several advantages and disadvantages.

Advantages

- Staff involvement in planning leads to better participation by the staff and a more relevant program.
- If the committee is institution-wide, a coordinated program should result.

Disadvantages

- Committee appointment does not insure possession of sufficient knowledge or experience in staff development techniques.
- Since it is difficult to assign budgetary responsibility to a committee, the program is not likely to receive funding except on an item-by-item basis.

Application for a Structured Occupational Experience

In a number of institutions, a written request must be made to the program director or designated representative. Such a request should provide vital information concerning the professional improvement activities participants intend to pursue during the period of leave. Information to be collected may include:

- Name, address, and present position
- Work experience
- Education completed
- Nature of activities contemplated
- Reasons for participation
- Length of the experience
- Compensations/expenses
- Other significant information

Assessment of Competence

The major purpose of a structured occupational experience is to provide opportunities for personnel to acquire new and/or up-to-date competencies in their field. These competencies may be technical, managerial, and/or academic. In some instances a self-assessment inventory based on skills and knowledge related to the activity can help all parties verify or focus on acquired or needed competencies.

Professional Development Plan

To ensure that the structured occupational experience is virtually tailor-made for the individual, it is necessary for each participant, in consultation with the staff development committee, to formulate his/her personal plan for professional growth. This plan is a primary source of information for the staff development committee as they work with the individual to determine the content of their program. In addition, the plan also serves as documentation of the individual's commitment to the program and as an official device for recording the participant's progress toward attainment of specific goals. The content of the plan should be held in confidence by the staff development committee, the staff development coordinator, and the participant. The plan should not be used as a basis for determining salary increments, promotions, and the like.

Format of Plan

The format for an individual's professional development plan can be simple and straightforward. The form should include (1) the selected competencies, (2) target date for attaining each competency, (3) actual date of attainment, (4) procedures for competency attainment, including a description of the instructional materials to be used, and (5) signatures of the participant and staff development committee. Sample forms are provided in the Resource Materials Section.

Applications Review Committee

Upon the completed revision of the candidate's outlined plan of action, the director or application review committee may submit their decision in writing to the individual and any other designated administrator. The applicant's qualities and the potential for benefiting from such a structured occupational experience should be factors in the selection. In addition, the following aspects can be considered:

- part of required program for degree
- positive concern for developing and/or improving new programs in vocational education
- desire to pursue additional competencies

Identification and Evaluation of Potential Training Sites

If the application review committee accepts the individual's application, then potential sites may be identified with the assistance of the staff development committee, or the participant may be able to locate appropriate training stations.

Sites should be evaluated as to their suitability to meet the participant's structured occupational experience objectives. To accomplish this effectively, identify a contact person before the visit. At the site either the staff development coordinator and/or the participant will inspect the area where the individual wants to train, talk to the contact person, and discuss a potential work agreement. Examples of details to be discussed include:

- Company policies and procedures
- Liability coverage
- Labor union agreement
- Length of experience
- Ability of the site to meet planned objectives
- Immediate supervisor (identified)
- Compensation (if applicable)

Confirmation of details of the occupational experience and an outline of the developmental plan should be included in a follow-up letter to the company, with a copy sent to staff development administrators at the respective institution.

The following guidelines may help evaluate potential training sites:

- The location must be able to provide a wide variety of experiences needed by the participant.
- The setting should expose the participant to the latest developments in his/her interest area.
- The employer supports the program.
- The employer provides safe working conditions.

Credit for Structured Experiences

In general, each state institution has a set of regulations concerning awarding credit. Usually, structured occupational experiences are a part of the in-service program of an institution. However, the amount of credit awarded for the structured occupational experience may depend on two aspects: quantitative and qualitative.

- Quantitative – number of hours worked
- Qualitative – detailed occupational plan
  – nature and variety of responsibilities
  – assessment

Credit in some instances may be earned by meeting the certification requirements of a given state and/or an institution's staff improvement plan.

Choice of Approaches

The following suggestions should aid institutions in developing plans that fit their own situation and needs.

Alternative Vehicles for Teachers/Administrators

Experiences that may help in meeting individual objectives include:

- Acting as a consultant
- Assisting in training operations
- Tours
- Observations of current practices
- Independent Study
- Work experiences (part/full-time)
- Related course work
- Teaching experience
- Exchange programs
- Attending conferences, fairs, exhibits
- Attending seminars
- Review new audiovisual developments
- Faculty residencies
- Sabbaticals
- Fellowships
- Orientation
- Workshop participation
- Unstructured experiences
- Interviews/discussions with individuals currently in business/industry/labor

Alternative Scheduling

Arrangements may be long-term, for a quarter/semester or even up to a year. Many business, industry and labor participants prefer short-term activities. Schedules for time may include:

- 1-5 day visits
- 1-4 week experiences
- Year-long experiences
- Summer experiences
- Semester or quarter breaks
- Vacation

Institutional/Instructor Concerns for Selected Experience

Items to be given substantial attention before planning a structured occupational experience are:

- Eligibility for leave
- Number of recepients requesting an experience

- Length of requested leave
- Salary differential
- Fringe benefits
- Job/seniority
- Liabilities
- Participant's obligations on completion of selected activities
- Professional recognition

Business/Industry/Labor Concerns for Selected Experiences

Consider these items when planning a structured occupational experience:

- Liability regulations
- Seniority practices
- Work agreements
- Insurance coverage
- Acceptance of non-union workers
- Wage scale differences of financial responsibilities
- Length of experience
- Most appropriate time of year

Secure Resources

The following resources are necessary for the successful operation of structured occupational experiences.

Budget

Planners arranging for structured occupational experiences most often are working with an allocated sum of money. Budgets may include the following items: telephone, travel, compensation of substitute personnel, office supplies, postage, printing, and expenses incurred while participating in approved seminars and workshops paid by the institution.

Responsibility

When the decision is made to initiate or strengthen the institution's linkage with the private sector, the responsibility for the planning and implementation of structured occupational experiences may be assigned to a variety of individuals. The most commonly used approaches for assigning responsibility for professional staff development are: individual approach, staff approach, admininstrator approach, and committee approach.

- Individual approach: with this approach the participant member is held responsible for planning and implementing his/her own professional development plan.
- Staff approach: a staff position, either full or part-time, is created in the institution. The responsibility of the person in that position is to coordinate the development of the institution's staff development plan and activities.
- Administration approach: the principal, chairperson, or dean organizes the staff development plan.
- Committee approach: involves the appointment of a staff development committee.

Financial Assistance

In order to attract individuals, a financial assistance plan may be needed. Such plans may include:

- days per year allowed each instructor at full pay
- fellowships
- scholarships
- waiver of tuition/fees for college courses
- business/industry/labor sharing in expenses

Develop a Resource File

An active, systematic file of potential sites is one of the best aids in organizing structured occupational experiences. Card files are useful in organizing and quickly retrieving needed information. Items to include are:

- Subject area
- Date of contact
- Name/address/phone of organization/association
- Number of visitors hosts will accommodate

- Best time to contact
- Amount of lead time required
- Experiences available
- Instructional materials available
- Time available for structured occupational experience
- Special comments
- Evaluation comments

Planning Steps

This section is designed to help in developing plans for the effective use of structured occupational experiences. These planning steps focus attention on gathering information, organizing details, and defining institutional objectives that are critical in establishing such a program.

List of Planning Steps

1. Determine Support:

   Are faculty and administration sympathetic to structured experiences?
   What are the values of such arrangements to your institution?

2. Determine Financial Support:

   What are potential funding sources to investigate?
   Will adequate sources of funding be available?

3. Investigate Clearances:

   What clearance procedures are essential?

4. Assess Competencies:

   How do you intend to assess competencies and participants' needs?

5. Alternative Experiences:

   What other experiences should be available?

6. Determine Training Plan/Sites and Assignments:

   How do you intend to locate and avaluate training sites?
   What should a structured occupational experience training plan contain?
   What type of assignments will the participants perform?

7. Examine Liability–Responsibilities

Have liability aspects been examined?
Have responsibilities of all parties been identified?

8. Reward System:

How do you intend to reward participants?

9. Plan Evaluation:

How do you intend to evaluate the participant and program?
What is your plan to merge all data evaluation?

Implementing

This part of the handbook section contains items to consider in implementing structured work experiences. These items are followed by an implementation steps checklist.

Examine Existing Policies and Procedures

Examine the following items to develop procedures/guidelines for structured occupational experiences:

- Institutional/departmental incentives for participation
- Available financial resources
- Liability, accident, and health coverage
- Costs/benefits of such an arrangement
- Opinions of representatives of the department, faculty, staff
- Reimbursement obligations
- Potential restrictions
- Salaries
- Institutional clearance procedures

Establish Policies and Procedures

Develop and incorporate the following policies and procedures into the guidelines for structured occupational experiences:

- Criteria for staff participation
- Criteria for promotion, professional recognition
- Criteria for placing participants
- Insurance coverage
- Financial responsibilities
- Criteria for establishing work agreements
- Criteria for selecting potential sites
- Criteria for establishing employer contacts

Selection Criteria

Criteria for selection of vocational personnel might include giving priority to those who:

- Have not had recent work experience
- Have not attended a seminar, workshop within the last three years
- Have the least amount of work experience in their service area
- Want to innovate their occupation

Criteria for selection of work experiences might include:

- Participants who would be able to acquire skills and knowledge that could be utilized in more effective teaching
- The firm/organization that will agree to cooperate in achieving the objectives of the structured experience
- The firm/organization that has the necessary sites for relevant activities

Personnel Incentives

Structured occupational experience. It is important to consider what type of institutional support is given to encourage the involvement of participants in business, industry, labor and education activities. Unless there is an institutional environment supportive of this type of personnel development, which translates into a reward system, its chances for success are marginal. The institution should identify and/or agree to establish relevant incentives for individuals involved in business, industry, labor and education activities. Such incentives might include:

- Promotion (rank and/or salary)
- Work load considerations (including extra compensation for extra work)
- Tenure
- Professional recognition
- Waiver of fees
- Financial incentives

Monetary gain should not be a direct factor in seeking improvement, but it cannot be disregarded as a motivational factor.

Implementation Steps Checklist

- ☐ Determine institutional support and involvement
- ☐ Convene staff development committee (if applicable)
- ☐ Determine costs and values
- ☐ Determine clearance procedures
- ☐ Assess competencies
- ☐ Obtain application for structured occupational experiences
- ☐ Examine alternative structured experiences
- ☐ Review applications (staff development committee)
- ☐ Develop training plans
- ☐ Locate and select training sites
- ☐ Develop probable assignments and/or work agreements
- ☐ Determine responsibilities of participant and/or employer
- ☐ Examine potential liabilities of all parties involved
- ☐ Establish credit and reward system
- ☐ Evaluate the structured occupational experience

Assessing Impact

A well-conceived structured occupational experience must include some form of evaluation to determine the value of the structured experience to the participant. Valid and reliable evaluation materials should be available to concerned parties at the completion of the structured occupational experience. This may be achieved through:

- Reports submitted by the participant
- Employer's final evaluation
- Employer's feedback
- Supervisor's feedback

Evaluation should focus on the quality of the structured occupational experience and the management of the program. See Cooperative Internship Evaluation section for instruments that can be adapted for this purpose.

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RESOURCE MATERIALS

The example materials illustrated in this part are designed to be adapted and used selectively as your situation dictates. The purpose of these materials is to show a variety of standard forms, letters, suggested procedures, and other similar aids that would be useful to vocational educators.

List of Illustrations:

- Work/Training Plan
- Structured Work Experience Agreement
- Structured Occupational Experience Plan

STRUCTURED OCCUPATIONAL WORK EXPERIENCE
WORK/TRAINING PLAN

Educator's Name _____

Educator's Address _____

School _____ Phone _____

Teaching or Other Assignment _____

Approximate Time in Weeks for Each Phase of Work/Training Assignment Desired.	Work/Training Plan Desired
	(Describe in brief, specific terms the kind of work/ training assignment you want in industry or business.)
Dates Work/Training Desired (Please be Specific)	Location of Work/Training Desired (You may suggest a specific Company, Institution, etc.)

Approved

Signature of Educator _____ Date _____ Signature of Supervisor _____ Date _____

Work/Training Plan

Bureau of Vocational Education
Structured Work Experience Agreement

School _____

Educator's Name _____ Social Security No. _____

Educator's Address _____ Zip Code _____

Home Phone _____ Age _____ Sex _____

In Emergency Notify _____

Position _____ Service Area _____ No. Years _____

WORK EXPERIENCE RELATED TO PRESENT WORK

Location	Description	Dates

Firm Name _____

Firm Address _____ Zip Code _____

Supervisor of Educator _____

Work Schedule:

Work Experience at Firm will Start (Date) _____ and End _____

Hours Per Day _____ Will He be Paid by this Firm? _____

Will He Remain on Vocational Education Payroll? _____

Work Skills and Competencies Desired by the Educator: _____

_____

_____

_____

_____

Signature of Educator	Date	Signature of Employer	Date

Structured Work Experience Agreement

STRUCTURED OCCUPATIONAL EXPERIENCE PLAN

Name_____ Phone:

Office_____

Address_____

Home_____

_____

Instructional Area_____ No. Years Teaching_____

SPECIFIC COMPETENCIES TO BE DEVELOPED: List here the competencies to be developed based on needs assessment and/or personnel interest.

Competencies Needed	Expected Completion Date	Actual Completion Date

PROCEDURES FOR COMPETENCY ATTAINMENT: List or describe here the procedures to be used to achieve the identified competencies.

_____ _____ _____ _____

Signature of Supervisor Date Signature of Teacher Date

_____

Signature of Coordinator

CHAPTER 5

PERSONNEL EXCHANGE PROGRAMS
Between Business-Industry-Labor and Vocational Education

Introduction

Rationale

Continuing advances in technology, new employment opportunities, and changing work requirements demand that all vocational education personnel have current information on field developments and the business contacts needed to provide relevant vocational programs. Keeping up to date with evolving technologies, management, and training techniques is a concern of business, industry, labor, and education groups. The personnel exchange program provides a two-way communication process to help meet these needs.

Benefits

What are the benefits of an exchange program to vocational educators? Isolation from the current state-of-the-art is the all too common fate of vocational education personnel. The exchange program provides opportunities for short-term, up-to-date work experiences.

- Knowledge of current trends and practices enhances credibility with students and members of the business, industry, and labor community.
- Occupational experiences may improve classroom teaching and program/curriculum design.
- The experience is a self-motivating one.
- Communication and cooperative experiences provide opportunities to maintain a working relationship with business, industry, and labor. These ties may yield a liaison management structure, help future students or staff in experience programs, and provide personnel for advisory committees.
- Observation of management procedures may result in improved management practices in the department.

What are the benefits to the representatives of business, industry, and labor? Ultimately it means better communication with the educational staff that prepare the manpower pool. More specifically, business, industry, and labor representatives gain information regarding the objectives and processes of vocational education programs. These experiences provide opportunities to maintain a working relationship with the educational community, including assistance in providing

relevant occupational education. Participants can also learn of new media or training devices/techniques that may have application for training in business, industry, and labor. Finally, personnel exchange programs, properly organized and implemented, can be an effective and valuable method of professional staff development.

Planning

Model Procedure

The model procedure applies to both teacher/administrator participants and to those in the exchange from business, industry, or labor. The model procedure can include the following steps:

- Develop objectives
- Develop implementation plan
- Identify and select exchange opportunities
- Design placement plan
- Implement program
- Follow-up
- Evaluate

Develop Objectives

Institution/department objectives for staff participation in the exchange program should be developed. The objectives could include:

- To plan, implement, and evaluate a personnel development program that will enable teachers to revise or reorient their program to reflect current changes in business, industry, and labor.
- To establish a process for continuing interaction between the institution/department and business, industry, and labor.
- To revise curriculum content based on observations and dialogues with business, industry, and labor representatives.
- To develop case problems and simulations based upon observation, dialogue, and analysis of on-site experiences.
- To secure additional instructional materials to supplement present instruction.
- To observe the current work-flow skills, and equipment used in business and industrial settings (including management).

Objectives developed for business, industry, and labor representatives participating in exchange programs could include:

- Increased awareness of how business, industry, and labor can effectively interface with vocational educators
- Assistance in ultimately providing more relevant occupational instruction to students
- Teaching/learning strategies that could be adapted in on-the-job instruction and other training programs
- To learn about vocational curriculum and teaching/learning approaches being taught
- To improve education/community relations
- To develop communication channels where business, industry, and labor might give input into the education system

Develop Implementation Plan

An institution/department plan should be created to facilitate the exchange of vocational educators with business, industry, and labor representatives. Equal attention should be given to planning both aspects of the exchange program.

Planning involves:

- selecting individual/staff responsible for coordinating the program
- examining existing policies/procedures
- committing resources
- examining alternative experiences available
- providing necessary time
- developing program procedures and guidelines for both aspects of the program

Identify and Select Business, Industry, and Labor Opportunities

Activities include promotion of the program, identification and analysis of a variety of potential learning sites.

Disseminate project description. Information dissemination and public relations are vital in securing business, industry, and labor sites for the exchange program. Steps need to be identified to orient the business, industry, and labor community to the purposes and procedures of the project.

Potential audiences include:

- State/local Chambers of Commerce
- Existing advisory committees
- Business and industry societies
- Local civic service clubs
- State/local unions and
- Owners and managers of local/regional business and industries

Ways to disseminate information include:

- Newspapers
- Luncheon meetings
- Newsletters
- Brochures
- Survey to determine interest/cover letter and
- Project advisory committee

It is recommended to schedule individual meetings with potential participants to explain how they could become involved in work experience activities.

News coverage of local exchange program activities or meetings with likely participants is a good idea. Permission should be obtained for any stories or photographs used.

Contact business, industry, and labor. Contact appropriate persons in business, industries, and labor unions who could help meet the established objectives, and explain the proposed plan.

If the anticipated number of placements is fairly extensive, an initial survey of available sites may be advisable. If the exchange involves only one or two faculty members/administrators, direct contact with a business, industry, or labor union selected by faculty members is more expedient. There is a definite value to faculty members participating in the search and selection of a work site.

The purpose of the initial contact is to request availability of the site for faculty/administrator activities, to set a date to examine the potential of the site to meet identified objectives, and to discuss details relevant to participating at a work site.

Implement Program

The activities engaged in will depend upon the agreement between the participating staff members and the site personnel. These activities can include actual on-the-job experience, training opportunities, or observation.

If an orientation session will not be held (see Choice of Approaches for suggestions), individuals involved will have a more positive experience if they:

- find out as much as possible about the site before the experience
- familiarize themselves with the company policies, procedures, and organizational structure

Recommendations for the business/industrial representative in a long-term educational experience.

- The industrial representative should have three-quarters the normal teaching load to ease his/her adjustment to the academic world.

A sample contact letter is included in Resource Materials.

Visit the site. The site should be evaluated as to its suitability to meet the work experience objectives developed by the faculty member/administrator.

A contact person should be identified before the visit. At the site either the staff development coordinator and/or the faculty member will inspect the area where the faculty member/administrator wants to train, talk to the contact person, and discuss a potential work agreement.

Details to be discussed include:

- Objectives of the faculty/administrator applicant
- Ability of the site to meet these objectives
- Length of experience
- Salary details (if applicable)
- Immediate supervisor
- Company policies and procedures
- Liability coverage
- Labor union agreement with plan

Confirmation of details of the work experience and an outline of the work plan should be included in a follow-up letter to the company, with a copy sent to any necessary administrators at the educational institution.

A sample site evaluation form is included in Resource Materials.

Develop a Placement Plan

Each individual participant must state his/her objectives, plan of action, and complete a work agreement. Both the educator/applicant and the business, industry, or labor representative should

define the type of work experience most likely to meet their needs and objectives. Applicant and participating B/I/L representatives can then be compatibly matched and a work agreement developed and signed based on joint objectives.

- A staff member should acquaint the representative with the entire educational operation.
- The institution/department should assign an individual who will provide assistance to the representative. Ideally these two would share the same office.
- A classroom orientation period before the exchange begins should be scheduled so the representative from industry can work with the instructor in an actual class situation. Another approach is to have the representative teamed with another instructor.
- Both parties should evaluate the experience periodically to upgrade similar projects in the future.

If the experience for the teacher/administrator is to be a series of tours, consider the following items:

- Plan an itinerary that schedules more time at a few sites rather than little time at many sites.
- See the end product first and understand the requirements for its use. This aids in the understanding of the production process.
- Balance time between actual plan operations and learning about the relation of materials, engineering, and product development programs.
- Review tour itineraries in advance to avoid unnecessary repetition.

Follow-up

Follow-up and evaluation techniques should be established in the planning step. These activities provide information on the program and the site. Evaluation activities correspond to the objectives of the work experience. They must measure attainment of objectives. When all evaluation data is gathered, a plan should be developed to combine the evaluation material.

Evaluation will be achieved by a combination of feedback from the employer and the educator/participant. Changes to be made by either participant should be identified and an action plan to achieve these changes implemented.

Choice of Approaches

Alternative forms and procedures for personnel exchange programs are presented in this section. These suggestions should aid departments/institutions in developing plans that are unique to their own situation and needs. No programs can be found that carry on a model personnel exchange program; instead several variations can fit particular needs.

Alternative Experiences for Teachers/Administrators

- Orientation to overall plant management
- Systematic observations of current practices
- Productive employment (paid or unpaid)
- Tours
- Interviews with workers, management
- Attending conferences in training centers
- Participation in training programs
- Assisting in training operations
- Acting as consultant

Alternative Experiences for Business, Industry, and Labor Representatives

- Consultant to program/curriculum design or equipment/facilities
- Consultant on training techniques
- Resource person in class; for example, give demonstrations, act as speaker, give input on areas unknown to teacher
- On-loan faculty member for an extended period of time
- Talk with administrators
- Tour institution
- Short-term instructor

Alternative exchange arrangements include one-to-one exchange, group exchange or consortium.

Consortium Approach

This approach uses several educational institutions to develop a system to coordinate implementation activities and placement of participants.

An advantage of the consortium approach is the creation of a pool of potential business, labor and industry exchange sites with more variety than that of a single department/institution.

Alternative Scheduling

Arrangements may be long-term, for a semester or even up to a year. Many business, industry, and labor participants prefer short-term activities. Schedules for time may include:

- 1-5 day visits
- 1-4 week experiences
- Year-long experiences
- Summer
- Semester or quarter breaks

Arrangements need not be parallel for both teachers/administrators and business, industry, and labor representatives.

Participant Meetings

Depending on the number of individuals involved in the exchange, an orientation meeting may be held for the participants from both education and business, industry, and labor.

Orientation meetings can:

- Review the purposes of the program
- Provide an opportunity for participants to develop personal program objectives
- Provide an opportunity for participants to develop work/experience plans
- Provide an opportunity for participants to share expectations
- Review program procedures

Another altnerative is post-program meeting where participants share their program evaluations and develop joint recommendations for change.

Business/Industry Concerns for Long-term Experiences

Items to be considered when planning a long-term personnel exchange program include:

- Difficulty of releasing a productive worker for an extended period of time
- Industrial representative may be transferred, necessitating replacement
- Industrial representative may become involved in labor negotiations
- Liability regulations
- Certification status

Labor Concerns for Long-term Experiences

Items to be considered when planning a long-term personnel exchange program include:

- No collective bargaining for public employees
- Acceptance of non-union exchange worker
- Seniority practices
- Wage scale differences
- Created work situation may need to be filled at the end of the experience

Instructor/Administrator Concerns for Long-term Experience

Items to be considered for long-term personnel exchange program include: job seniority, salary differential, budget readjustments, length of leave, number of instructors/administrators on leave, obligation of teacher/administrator on completion of leave, eligibility for leave, selection of instructors/administrators, and fringe benefit contributions.

Secure Resources

Budget

Planners arranging for personnel exchange activities most often are working with an allocated sum of money, whether it be a contract budget or a portion of staff development monies.

Budget costs include printing, postage, office supplies, fulltime and substitute salaries, travel and telephone expenses.

Responsibility

Depending on the scope of the personnel exchange activities, an individual and/or staff should be given responsibility for coordination of activities. Existing advisory committees might be used in the staff exchange program or a special advisory committee might be organized to aid in planning, implementing and evaluating the program.

An advisory committee could assist by:

- Identifying strategies for building program support in the business, industry, and labor community
- Encouraging the cooperation of business and industries for providing work experiences
- Assisting in the identification of potential work experience sites

- Encouraging representatives of business and industry to seek experiences in the educational setting
- Reviewing program plans
- Reviewing evaluation plans
- Reviewing evaluation findings and making suggestions to the staff for improving the exchange program

Develop a Resource File

An active, systematic file of potential sites is one of the best aids in organizing work experience sites.

Include the following information:

- Subject area
- Date of contact
- Name/address/phone of organization
- Number of visitors/work participants willing to host
- Best time to contact
- Amount of lead time required
- Experiences available
- Instructional materials available
- Time available for tours/work experience
- Special comments
- Evaluation comments

Planning Steps

Planning steps.

1. *Determine Needs:* What needs are met by involvement in a personnel exchange program?
2. *Faculty/Administrator Involvement:* What faculty/administrator might become involved?
3. *Determine Clearances:* What types of clearances/legal constraints need examination?

4. *Determine Sites:* What are potential business, industry, labor sites?

5. *Scheduling:* What scheduling arrangements will work best?

6. *Work Plans:* What kinds of information should be included in the work plans?

7. *Evaluation:* What type of evaluation activities could be used?

Implementing

This section suggests items to consider when investigating and establishing policies and procedures. A checklist follows which reviews the major items considered in implementing personnel exchange programs.

Examine Existing Policies and Procedures

Business, industry, and labor policy/procedures. Examine the following items to develop procedures/guidelines for teacher/administrator experiences in business, industry, or labor sites:

- Institutional clearance procedures
- Existing communication channels
- Department/institution incentives for participation
- Available financial resources
- Reimbursement procedures/guidelines for travel/lodging
- Criteria for alternative approaches for securing release time and application guidelines
- Insurance coverage
- Salaries
- Cost/benefits
- Labor agreement restrictions

Institutional policy/procedures. Examine the following items to develop procedures/guidelines for experiences by business, industry, and labor representatives in institutions:

- Existing communication channels
- Business, industry, and labor clearance procedures
- Salaries
- Insurance coverage
- Reimbursement obligations/procedures

Establish Policies and Procedures

Teacher/administrator participation. Develop or incorporate the following policies/guidelines into the procedure for teacher/administrator work experiences in business, industry, and labor sites.

- Criteria for staff participation
- Alternative approaches for obtaining necessary release time
- Procedures for contacting business, industry, and labor
- Criteria for establishing work agreements
- Salary responsibility
- Insurance coverage and
- Criteria for faculty incentives

Business, industry, and labor participation. Develop or incorporate the following policies and procedures into the plan for business, industry, and labor experiences in institutional sites.

- Criteria for staff participation
- Procedures for determining experiences
- Financial responsibilities
- Insurance coverage

Selection criteria. Criteria aid in effective implementation of the program and helps match individuals with beneficial experiences.

Faculty and staff. Give priority to those teachers/administrators who have the least amount of work experience in their service areas or have not had recent in-the-field training.

Business, industry, and labor representatives.

- Give priority to representatives that could be easily certified as vocational educators.
- Give priority to representatives who have shown a desire to participate by agreeing to attend orientation sessions to develop objectives and to design experiences.

Work experiences for teachers/administrators.

- Give priority to participants who could transfer acquired skills into more effective teaching.
- Give priority to the firm/organization that will assign an appropriate representative to participate in an educational setting.
- Give priority to the firm/organization that will cooperate in achieving the objectives of the program.

Institutional experiences for business, industry, and labor representatives.

- The representative's assignment should be in the area of the individual's speciality.
- The representative's assignment should be at a level where he/she can make his/her greatest contribution.

Faculty/administrator incentives. The institution and department(s) should identify and/or agree to establish benefits for individuals involved in business, industry, and labor activities. Such factors might include:

- Promotional (both rank and salary)
- Work-load considerations
- Tenure
- Professional recognition

Implementation Checklist

This checklist reviews major items involved in planning for the use of personnel exchange programs to increase business, industry, and labor inputs into vocational education.

- ☐ Develop institutional/faculty/administrator objectives
- ☐ Examine alternative approaches
- ☐ Examine institutional clearance procedures
- ☐ Organize advisory committee (if applicable)
- ☐ Develop institutional clearance procedures
- ☐ Develop institutional/departmental implementation plan for teacher/administrator
- ☐ Develop institutional/departmental implementation plan for business, industry, labor representatives
- ☐ Prepare information dissemination materials
- ☐ Contact potential business, industry, labor sites
- ☐ Analyze potential business, industry, labor sites
- ☐ Develop work plans for teachers/administrators
- ☐ Confirm business, industry, labor site placement
- ☐ Develop work plans for business, industry, labor representatives
- ☐ Hold orientation meeting (if applicable)
- ☐ Implement program
- ☐ Hold post-program meeting (if applicable)
- ☐ Evaluate program

Assessing Impact

Evaluation of Personnel Exchange Program

Evaluation involves input from:

- The educational institution host.
- The business, labor or industrial visitor
- The educator/administrator visitor.
- The business, labor, or industrial host.
- The advisory committee or personnel exchange program coordinator (if applicable).

Evaluation may be shared between the educational institution and the industrial representative if this arrangement was agreed upon. In any case, a final written evaluation summarizing the experience from the perspective of both host and participant should be kept on the reverse of the RESOURCE FILE CARD. This information is crucial to maintenance of a quality exchange program and should be kept current and accessible to future coordinators of the exchange program.

Evaluation also should consider:

- The extent to which stated objectives of the program were met
- The efficiency and thoroughness of the planning process with an eye towards streamlining procedures and improving communication in the future

Selected References

This page lists selected reference materials that pertain to personnel exchange programs. In addition to these materials, each service area has a multitude of organizations and publications that are related to that particular service area. The library should be helpful in identifying these. You are encouraged to add to this list.

Print Materials

Entorf, J. F. and Callender, R. W. Industry-Education Exchange: A Program for Mutual Assistance. *Technical Education News*, Vol. 28, No. 3, 1969.

Garber, W. *Vocational Education, Business and Industry Staff Exchange Project.* Proposal for an EPDA, Part F-553 Project. Warrensburg, Missouri: Central Missouri State University, 1977.

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Thomas, E.G. *Manual for the Kentucky Appalachia Vocational Staff Exchange Project.* Bureau of Vocational Education, Kentucky Department of Education and the Appalachian Region Commission, 1976.

Vocational Education, Business, and Industry Staff Exchange Project. Warrensburg, Missouri: Central Missouri State University, working papers, (nd).

Vocational Education/Business Interface in Nebraska. Final Report. Milford, Nebraska: Southeast Community College. Milford Campus, 1975.

AV Materials

Texas Education Agency. 16 mm film (color) "Personnel Exchange in Texas." 201 East 11th Street, Austin, Texas 78701.

RESOURCE MATERIALS

The example materials illustrated in this part are designed to be adapted and used selectively as your situation dictates. The purpose of these materials is to show a variety of standard forms, letters, suggested procedures, and other similar aids that would be useful to vocational educators.

List of Illustrations:

- Sample Contact Letter
- Sample Site Evaluation Form
- Sample Worksheet for Industry Representatives' School Visits

Dear_____:

The vocational teacher departments of the University of _____ has implemented an educator, business/industry/labor personnel exchange program which would involve faculty from the departments of business, distributive, and home economics vocational teacher education. If you have not been introduced to this program, the enclosed brochure will help to familiarize you with it.

I would like to meet with you at your earliest convenience to explore the possibility of one of our faculty receiving experience at your firm to observe new skills and techniques that would be helpful to update curriculum content.

I will call your office the week of _____ to arrange an appointment to explain the benefits and operation of the project.

Sincerely,

Coordinator
Faculty Industry Exchange

Sample Contact Letter

SITE EVALUATION
FORM

Approved Disapproved _____

_____

Educator _____ Date Visited _____

Name of Firm _____ Dates of Exchange _____

Persons Interviewed _____

_____

QUESTIONS TO BE COVERED

Is the firm able to provide the training and experiences needed to develop the desired skills and competencies?

Will the firm provide an opportunity for the educator to practice the desired new skills and competencies?

Does the firm have the proper equipment needed for practice?

Will the firm provide proper supervision?

Are the duties and tasks to be completed for the exchange satisfactory to the firm?

Yes No _____

Does the supervisor agree to work with the educator and complete the evaluation form? _____

Name _____

What will the working hours be? _____ Will educator be employed? _____

Are there any pertinent working arrangements and conditions?

_____

_____

Was agreement signed? _____ Was evaluation sheet left? _____

Site Evaluator _____

Sample Site Evaluation Form

WORKSHEET

INDUSTRY REPRESENTATIVE VISITATIONS TO SCHOOLS

Suggested Activities

Date of first visit _____ Time _____

Date of second visit _____ Time _____

Person to contact _____ Where to meet _____

This worksheet is provided to assist in the planning for industrial representative visitations to industry. It is expected that the industrial representative will visit the area vocational technical school on two days with the vocational teacher as host. Planning is necessary to make the time spent more productive. This worksheet will provide a guide for joint planning by the teacher and the industry representative. Both the teacher and the industrial representative will be together when the exchange visits are made.

OVERALL OBJECTIVES FOR VISITS BY INDUSTRY REPRESENTATIVE TO SCHOOL

Observe classroom activities in order to become better acquainted with curriculum, methods of instruction, equipment, and performance standards.

Interact with vocational teachers and administrators in order to exchange ideas and make suggestions for the improvement of training programs.

Identify ways that business and industry can assist the educational agencies to provide relevant occupational education.

Identify ways that industry can assist the school in developing a more effective placement capability.

Identify ways that industry can assist in developing more effective cooperative education work-experience programs.

PLANNING THE FIRST VISIT TO SCHOOL

Suggested Activities

1. Tour of the school building and facilities--Get the big picture.

   Observe types of programs and activities being offered.

2. Interact with administrative personnel:
   (Check those you desire to interact with)

Superintendent	
Director of Area Vocational School	____
Principal	____
High School Counselor	____
Vocational Counselor	____

Sample Worksheet for Industry Representatives School Visits

Job placement coordinator ____
T&I Teacher-Coordinator ____
COE Teacher-Coordinator ____
Adult Evening Coordinator ____
_____ ____
_____ ____

3. Observe and participate in classroom and shop activities in your field.

(Possible activities to be observed)

Demonstration of job skills or job operations
Shop or Laboratory activities
Class discussion
Lecture
Role-playing
Buzz Session
VICA club meeting
Students practicing job skills
_____
_____

4. Review curriculum, lesson plans, textbooks, study guides, training kits, individualized instructional materials, reference books, trade journals, and other supplementary materials.

5. Review skills and competencies expected of students. Review the placement procedures of T & I students.

6. Review teacher's method of instruction as well as the skills and competencies required for effective teaching.

7. Informal meeting with other vocational instructors for interaction and a question and answer session.

Rough Draft Planning

Use the space below for planning the agenda that you prefer to follow for the first day visit to the area vocational technical school. This will allow for flexibility and modification of the tentative agenda outline above.

Sample Worksheet for Industry Representatives School Visits (Continued)

CHAPTER 6

ADVISORY COMMITTEES
Establishing Educational Advisory Committees That Involve Business, Industry, and Labor

Introduction

Rationale

Program curricula must evolve to meet changes within the vocational education field. It is the task of advisory committees to continually assess and evaluate the impact of change in four important areas: new knowledge and technology, economy, society, and legislation. The advisory committee concept has been developed to help vocational educators meet their ultimate goal—the placement of graduates in useful, gainful and meaningful employment situations.

Benefits

Advisory committees act as a liaison between the educational institution and the public by providing information on a continuing basis as it relates to fund raising, bond issues, and legislative action necessary to get public support for educational programs. Advisory committees serve as lobbyists for vocational education programs. They also are effective public relations agents. Most importantly, they keep educators informed of changes in the pertinent technical fields. Beyond these three informational functions, advisory committees have the following beneficial roles:

- Continually update the professional-technical skills of vocational education teachers/administrators by organizing various in-service activities
- Help secure outside revenue sources for program support and equipment purchases
- Oversee occupational surveys to evaluate labor market needs, assess the employment picture, and recommend educational changes
- Review course content from the perspective of field experts and potential employers
- Help tap community resource persons, facilities, equipment, and field trip sites
- Place students and take part in the continuous evaluation of the total educational program

Planning

Model Procedures

A model procedure for establishing an advisory committee for a vocational institution or department includes the following activities:

- Investigate history of advisory committees in the institution
- Determine purpose/function of committee
- Determine criteria for member selection
- Determine roles of committee members
- Investigate sources for potential members
- Send invitational letter
- Send official appointment letter
- Prepare for first meeting
- Plan for recognition of committee contributions

Investigate History of Advisory Committee in the Institution

- Have advisory committees existed before?
- What were their functions in the past?
- Are committees now in operation, inactive, disbanded?
- What procedures must be followed in establishing the committee?
- What are the attitudes of the administration and co-workers towards advisory committees?

Determine Purposes/Functions of the Committee

Before organizing the committee, make decisions on the following items:

- Type of membership required
- Status—ad hoc or on-going committee?
- Number of members and length of term

- Decide frequency of committee meetings
- Decide if an official constitution or guideline is needed

Determine Criteria for Member Selection

A basic concern voiced by educators establishing advisory committees for the first time is how to select effective, representative, knowledgeable, and active members.

Regardless of whether committee members are chosen because of organizations or interest areas they represent or selected as individuals, look for members that:

- Work effectively as unbiased members willing to explore a variety of alternative positions rather than promote a favorite personal approach
- Indicate intention and ability to prepare for, attend and participate in committee meetings
- Indicate an interest in vocational education
- Represent a variety of relevant disciplines and experiences
- Demonstrated capability for dealing with complex problems and issues: identifying, clarifying, and assessing concepts and positions

Investigate Sources for Potential Members

Some suggested sources to investigate for potential members include:

- Business and industries:
  - Large companies and corporations
  - Small neighborhood businesses
  - Professional, technical, and trade organizations
  - Chambers of Commerce
  - Business-Education Coordinating Councils
  - Business-sponsored civic groups
  - The several types of inter- and intra-business and industrial consortium committees unique to each community
- Organized labor
- Governmental agencies

- Military posts
- Faculty contacts
  - Other university departments
  - Personal contacts

Local Chambers of Commerce will frequently make available a membership directory which includes many of the above.

Organized Labor

Organized labor may be overlooked as a source of advisory committee members simply because academic institutions are unsure of ways to initiate dialogue. Suggestions that follow are keyed to the type of contact desired.

Type of Information	Contact
General Information	National Level Office • specific unions • federation of unions • labor-management training trust funds
Programs of statewide involvement	State or regional office • specific unions • federation of unions • labor-management training trust funds
Programs of departmentwide perspective	
Programs that are service area specific	Local Office • specific unions

Write or call the Information Officer at the local or regional union office and request needed references and/or the proper contact person.

Send Invitational Letter

Items to be included in an invitational letter to potential advisory committee members:

- Statement of purpose, status, and importance of committee
- Responsibilities

A sample letter of invitation is included in Resource Materials.

Send Official Appointment Letter

An appointment letter confirms the representative's membership on the advisory committee. If members of the committee are sent an appointment letter signed by the president of the university, a dean, the department chairmen and/or the school superintendent, additional status is given to membership on the committee.

A sample letter announcing official appointment is included in Resource Materials.

Meeting Preparation and Follow-up

Good administration requires adequate preparation. Consider the following points:

- Plan meetings well in advance of scheduling meeting date.
- Send proposed agenda to members prior to meeting.
- Leave open section in agenda for additions or corrections.
- Give details of meeting arrangements: parking, room locations, time frame.
- Include postal card for members to indicate willingness to attend.
- Remind members of meeting the day before by phone.
- Start and adjourn on time.
- File minutes and provide copies to members within two to four days of meeting.

Prepare for First Meeting

The first meeting of an advisory committee is very important. It requires careful preparation. The agenda should:

- Allow committee members to become acquainted
- Review guidelines of committee operation
- Identify the planned work schedule for the term
- Demonstrate that the committee has administrative backing

Determine Roles of Committee Members

Committee members must know their roles and the task of the committee to be successful and effective. Assign a full-time staff member to oversee committee actions and organization. Ex-officio members may be temporarily appointed to serve as consultants for special problems or project as long as the need exists.

- Ex-officio member:
  - Serves without vote
  - Serves in a consultant capacity
  - Can assume special responsibility on a project
  - Can express opinions on problems
- Chairperson:
  - Works with department/institution representative and committee members, sets meeting dates
  - Plans agenda with department/institution representatives
  - Presides at meetings
- Vice-chairperson (optional):
  - Presides in absence of chairperson
- Secretary:
  - Records and distributes minutes
  - Files minutes
  - Notifies members in writing of meetings
  - Reminds members of meetings by phone
- Institution/Department Representative:
  - Acts as liaison between committee and institution's educational administration
  - Plans agendas with chairperson
  - Helps take necessary steps on recommendations
  - Provides needed clerical help
  - Provides validation and evaluation guidelines and checklists

Plan for Recognition of Committee Contributions

Recognizing the advisory committee's contributions is important to maintain their level of involvement. Consider the following approaches to show appreciation:

- Notify company officials of department's appreciation for the work of an employee council member.
- Offer certificates of services, awards, etc.
- Invite committee members to the institution and/or department functions.
- Have a chief administrator/principal/dean attend selected meetings of the committees to give credit for past work.
- Mail a letter of appreciation from chief administrator, dean, department chairperson, principal.
- List names of members, companies, agencies in publications, bulletins, college catalog and in media releases.

Alternative Uses/Types of Advisory Committees

It is important to examine the different types of advisory committees established by educational institutions and the way in which the law mandates the committees to operate on a state and federal level.

Levels of Advisory Committees

National Advisory Council: Was established under the 1968 Amendments to the Vocational Education Act of 1963 and consists of 21 members appointed by the President of the United States. This council is responsible for reporting on the administration, operating, and effectiveness of vocational and technical education throughout the nation.

State Advisory Council: Was also established and funded under the 1968 Amendments. It functions as a separate state agency under an executive order from the Governor and is responsible for evaluating the effectiveness of vocational and technical education programs throughout the state. All states are mandated by law to have such an advisory council.

Community-Education Council: Are established to promote and conduct volunteer programs and activities in public education through cooperation of both educators and business, labor and industry representatives. Industry-education councils differ from other councils in that they are organized to serve all the students and all the schools in a particular geographic area. They are joint efforts and are not mandated by law.

Advisory committees used in many institutions often fall into three categories:

General advisory committee: Usually an on-going committee that is concerned with the general development and maintenance of the entire educational program at a vocational education institute. It may or may not be used for regional or local purposes.

Departmental advisory committee: Serves a department as an on-going committee.

Special curriculum advisory committee: Gives advice on the content and operation of a single program or skill area.

An institution may have one or more of these types of committees in operation at one time depending on the size and number of skill areas in the vocational program.

Functions of Advisory Committees

Advisory committees may fulfill the following functions (and others) in working with vocational education institutions:

1. Program development and review
   a. Technical content
   b. Share expertise of new and developing areas
   c. Advise on administrative operations
   d. Prepare occupational surveys to better prepare, upgrade, and retrain community individuals
   e. Assist the institution in establishing/revising its philosophy of vocational education
2. Program operation
   a. Serve as or arrange for guest instructors
   b. Help develop cooperative experiences between the institution and business, industry, and labor
   c. Arrange for plant visits and other field trips
   d. Advise on material, facilities, and financing
   e. Obtain instructional supplies and equipment
   f. Aid in maintaining current instructor's library of visual aids, magazines, and books
   g. Identify potential sites for cooperative work experiences
   h. Assist in developing educational objectives
   i. Inform institution of changes in the labor market including interpretation of local surveys on manpower needs, anticipated employment
   j. Assist in making cost studies for specialized program/course
   k. Help with work experience placement

3. Instructor inservice

   a. Provide opportunities for upgrading instructor's technical skills through work experience, inservice, clinics, and/or workshops

   b. Obtain subscriptions to industry magazines

   c. Obtain membership for instructors in industry organizations

   d. Secure funding to assist instructors in attending professional and industrial meetings, workshops, seminars

   e. Help with work experience placement

4. Assist in public relations

   a. Serve as speakers about business, industry, labor and education cooperation

   b. Provide news releases to industrial magazines, newsletters to the public

   c. Assist in evaluating the institution's public relations policy and action

Planning Checklist

The Planning Checklist focuses attention on steps involved in gathering information, organizing details, and defining objectives critical to involving business, industry and labor representatives in advisory committees.

- ☐ Determine function(s) of the committee
- ☐ Decide committee type and size
- ☐ Determine necessary clearance procedures
- ☐ Inform administrators of the intent to form an advisory committee
- ☐ Decide on membership criteria
- ☐ Investigate local, regional, and state sources for potential members
- ☐ Write invitational letter
- ☐ Plan first meeting agenda
- ☐ Prepare advance meeting information and send to members
- ☐ Evaluate planning and meeting procedures
- ☐ Plan second meeting incorporating changes

- ☐ Recognize individual and group contributions of advisory committee
- ☐ Determine if advisory committee is achieving its purpose through evaluation and follow-up activities
- ☐ Reshape, refine and/or restructure scope of responsibility for committee based on evaluation findings

Implementing

Examine Existing Policies and Procedures

Examine the following items to develop procedures/guidelines for advisory committees:

- Institutional clearance procedures
- Available financial resources
- Guidelines for existing advisory committees
- Alternative approaches for scheduling

Equity

The 1975 Congressional hearings on "Sex Discrimination and Sex Stereotyping Vocational Education," Title IX of the Education Amendments of 1972, and the passage of the Education Amendments of 1976 focus attention on the need to eliminate sex discrimination and sex stereotyping in vocational education.

Including minority representatives on the advisory committee, helps the educational institution stay informed about equity legislation, and focuses attention on equal opportunity and access to the various vocational education fields.

Establish Policies and Procedures

Membership Rotation

Rotate membership to ensure new ideas and approaches. Procedures should be established to insure membership rotation preferably on a three-year plan format, with one-third of the membership changing each year.

Secure Resources

Funding

The advisory committee should have a general fund whenever possible. In many instances participation is voluntary with the educational sponsor assuming most operating costs.

Meeting Locations

Meetings of advisory committees are best held in the institution's board rooms or conference rooms. Advisory committee meetings should not be held in classrooms because seating is not conducive to committee functions.

Frequently advisory committee meetings are "rotated" through the community and are held in community centers. By rotating the meeting place, vocational education activities and the corresponding community involvement becomes apparent to the citizenry and good public relations can result.

Absenteeism

Rules should define attendance standards. Many guidelines drop any member who misses three consecutive meetings.

Alternates

Do not encourage substitutes because this practice contributes to absenteeism and ineffective committee work.

Committee Size

Determine the committee size. Six to twelve members is generally considered a workable size.

Meetings

Decide how often committee will need to meet to accomplish objectives.

Encourage Attendance

- Plan enough tasks to challenge committee members.
- Minimize personal conflicts among members.
- Create productive, stimulating, exciting and democratically run meetings.
- Recognize commitee advice/recommendations in writing.
- Recognize committee contributions.

News Releases

Acquaint the public with community involvement in vocational education through effective use of news media. Clear all press releases with advisory committee members.

Implementation Checklist

- ☐ Determine purpose/functions of committee
- ☐ Investigate past history of advisory committees in the department/school
- ☐ Determine source and amount of operating finances
- ☐ Determine department support and involvement
- ☐ Locate outside support sources
- ☐ Determine clearance procedures
- ☐ Name person(s) to assume responsibility, coordinate advisory committee
- ☐ Determine committee type and size
- ☐ Determine membership criteria, length of term
- ☐ Investigate sources for possible members including minority representatives
- ☐ Make initial contact with potential members
- ☐ Appoint members; draw up policies on absenteeism, substitutes, press releases
- ☐ Determine agenda for first meeting
- ☐ Send letter informing members of first meeting
- ☐ Conduct first meeting
- ☐ Evaluate procedures and meeting format to date
- ☐ Revise, improve
- ☐ Plan and conduct second meeting
- ☐ Recognize members

Assessing Impact

Advisory Committees

The level of involvement and effectiveness of advisory committees vary considerably. Formative or in-process evaluation helps insure peak effectiveness. The focus of the formative evaluation may include the following areas:

1. *Evaluation by advisory committee members.* Determine from the committee members:

- appropriateness of the agenda
- satisfaction with the way meetings are conducted
- identification of major results of the meeting
- usefulness of the meeting

The information obtained from the evaluation should be fed back to the institution in order to improve future meetings.

2. *Evaluation by the institution.* In this case, the institution attempts to determine the usefulness of the advisory committee meeting and provide feedback to the advisory committee in order that future meetings better serve the institution's needs.
   - appropriateness of the agenda
   - level of understanding of the committee of agenda topics
   - relevance of recommendations

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- *Course of Study–Citizens Advisory Councils in Education.* Second edition by Phipps, Hofstrand and Shipley.
- *Advisory Councils in Educations–A Handbook.* By Hofstrand and Phipps.
- *Evaluative Criteria for Citizens Advisory Councils and Committees.* By Phipps and Heisner.
- *The How of Successful Citizens Advisory Committee Operation.* By Phipps and Knell.
- *The Study of Concerns of Citizens Advisory Members–A State-wide Survey.* By Phipps, Jackson and Shores.
- *Activities of Citizens Advisory Councils and Committees.* By Phipps, Jackson and Shores.
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- *Citizens Advisory Councils in Illinois–Identified in 1974.*

Publications – Available from other sources

- *A Guide to Establishing Vocational-Technical Advisory Committees.* Administrator's Guide, 1968. This document can be obtained from: Mr. Robert Batterbee, Chief, Printing and Mailing Section, Department Services Division, Department of Education, P.O. Box 420, Lansing, Michigan 48902.
- *Advisory Committees for Home Economics.* Teacher's Manual, 1969. Request from: Vocational Resource Center, Department of Vocational and Technical Education. Indiana State University, Terre Haute, Indiana 47809.
- *Organization, Function and Operation of Advisory Groups,* Jan. 1972. This document can be requested from: Roger G. Worthington, Director Industrial Laboratory, Department of Community Colleges, Education Building, Raleigh, North Carolina 27611.
- *Advisory Committees.* 1964 (pamphlet) 29 pp. Available through Ohio's Distributive Education, Materials Laboratory, 1885 Neil Avenue, 115 Townshend Hall, Columbus, Ohio 43210.

AV Materials

Filmstrips – Available from REDL, 357 Education Building, Urbana, Illinois 61801

- Benefits of Citizens Advisory Councils
- Benefits of Advisory Councils in Home Economics

- Citizens Advisory Councils and Health Occupations
- Citizens Advisory Councils in Agribusiness and Natural Resources
- Concerns of Advisory Councils in Business and Office Occupations
- Proper Functions of Citizens Advisory Councils
- The Role of Advisory to Vocational Education
- The Role of the Individual Council Member
- The Use of Advisory Councils in Industrially Oriented Occupations

Sound/Slide and Filmstrips with Cassettes – "Do We Really Care?"–Available from each of the teacher preparation institutions in the state and from Vocational and Technical Education Service, Michigan Department of Education, Lansing, Michigan 48904.

Sound/Slide – New Jersey Advisory Council on Vocational Education, 28 West State Street, Trenton Trust Building, Trenton, New Jersey 08608. Phone: (609) 292-7970; 7971

Education-Work Councils

National Association for Industry-Education Cooperation. *A Handbook: Industry-Education Councils.* Buffalo, New York: NAIEC, ND.

National Manpower Institute. *Work-Education Councils: Profiles of 21 Collaborative Efforts.* NMI, Washington, D.C., 1977.

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RESOURCE MATERIALS

The example materials illustrated in this part are designed to be adapted and used selectively as your situation dictates. The purpose of these materials is to show a variety of standard forms, letters, suggested procedures, and other similar aids that would be useful to vocational educators.

List of Illustrations:

- Sample Letter of Invitation
- Sample Letter Announcing Official Appointment
- Sample Letter of Appreciation to Advisory Committee Member

(Letterhead)

(Date)

(Inside Address)

Dear :

The (name of institution and department) is in the process of establishing an advisory committee which will involve educators, business, industry, and labor representatives. Due to the necessity to keep our vocational education program and staff ~~up~~-to-date with current developments, it is essential that we obtain input from the business, industry, and labor community. Your participation will be of great value to us in this endeavor.

May I take this opportunity to invite you to become a member of our (title) Advisory Committee. Your willingness to assist will help us make better decisions concerning quality education for students enrolled in our programs.

Please note we are asking you as a representative from (company/labor union name) to attend only (number) meetings on (dates). A schedule of meeting dates and agendas are enclosed.

You will receive a follow-up phone call on (date, time) in order to ascertain if you will be able to attend or not. Your interest and cooperation is greatly appreciated.

Sincerely,

(Name)
(Institution)
(Department)

Enclosures: agenda and calendar of meeting dates

Sample Letter of Invitation

(Letterhead)

(Date)

(Inside Address)

Dear :

The (department title) takes great pleasure in welcoming you as a member of our working team. Your appointment to serve a (length of time) term on the (title) Advisory Committee has been approved.

Your extensive background and experience in industry and your interest in vocational education qualify you as a most valuable member of this advisory team. Not only will the contribution of your talent be helpful to the industry, but to the community as well.

Your interest in (subject area) is appreciated.

Sincerely yours,

College President/
Dean

Sample Letter Announcing Official Appointment

(Letterhead)

(Date)

(Inside Address)

Dear :

I would like to take this opportunity to express my sincere appreciation for your participation with the (name of program of school) Advisory Committee. Your involvement has greatly benefited the program development at our school and the development of education in our community.

To show our appreciation, we would be honored if you would be our guest for the Advisory Committee Dinner on (date) at (location). We hope to see you then.

Sincerely,

(Name)

Sample Letter of Appreciation to Advisory Committee Member

CHAPTER 7

RESOURCE PERSONS
from Business/Industry and Labor

Introduction

Rationale

In order to acquire information about the present practices and requirements in their areas, vocational education personnel need to establish contacts with persons directly involved in business, industry, and labor. On the basis of their practical knowledge and experience, business, industry, and labor "practitioners" offer valuable contributions as *resource persons* in personnel development programs.

Benefits

A number of benefits may be derived from the use of resource persons, including:

- A chance to share new ideas
- An occasion to raise new questions
- A chance to gain access to special people
- An opportunity to expand knowledge
- A chance to exchange information and increase understanding
- An opportunity to improve and update skills
- An opportunity to establish close ties with business, industry, and labor representatives

Model Procedures

The effective use of resource persons requires careful planning and preparation. The planning process involves developing a resource file, determining objectives, choosing an approach, and allocating financial resources.

Developing a Resource File

To facilitate access to appropriate resource persons, a file should be organized to provide relevant information about potential resource persons. Locate the following types of information:

- Names of speakers able to describe business, industry, and labor operations and evolving technologies and/or teach new skills
- Names of craftspersons, executives and professional personnel who could serve as resources
- Names of executives, craftspersons, technicians, professional personnel willing to serve on advisory committees
- Sponsors of part-time employment/personnel exchange programs or cooperative internships
- Effective personnel willing to conduct or participate in workshops

A suggested form for a resource card file is included in Resource Materials. To obtain information regarding potential resource persons, it is necessary to investigate a variety of sources, including:

- Business and industry
  - Large companies and corporations
  - Small neighborhood business
  - Professional, technical, and trade organizations
  - Chambers of Commerce
  - Business-Education Coordinating Councils
  - Business-sponsored civic groups, and
  - Types of inter- and intra-business and industrial consortium committees unique to various communities, e.g., shopping mall associations
- Organized labor
- Governmental agencies
- Military posts
- Staff contacts
  - Advisory committees
  - Personal contacts.

Frequently, local Chambers of Commerce will provide a membership directory which includes many of the above.

Contact Public Relations Directors of large manufacturing and industrial firms, corporations and universities and request a list of speakers with expertise related to your interest area.

Organized Labor

Most labor unions are extremely community-oriented, have an abiding interest in the total welfare of their members including education, and can support their interest with personal representation and other resources. Personal rapport with community labor leaders is a worthwhile resource itself.

If an organization has had no previous contact with organized labor, staff members may be unsure of the best way to initiate communication. The following are some suggestions based on the type of information or linkage contact desired.

Type of Information	Contact
General information	National level office • Specific unions • Federation of unions • Labor-management training trust funds
Programs of statewide involvement	State or regional office • Specific unions • Federation of unions • Labor-management training trust funds
Programs of department-wide perspective or Programs that are service-area specific	Local office • Specific unions

To secure information on communication channels or the name of an initial contact person for the local office of a specific union, or call the state or regional office dealing with the desired program and ask for the needed references. All unions, state and local, employ information officers specifically to deal with requests from the public.

Retired Persons

Retired persons are also an excellent resource pool, successfully used by various groups. For example, ACTION, the national agency for volunteer service, used SCORE (Service Corps of Retired Executives) as technical advisors to develop minority business enterprises. Sources to investigate include national and local retirement groups associated with businesses and civic organizations.

Throughout the process of identifying resource persons, staff members have an excellent opportunity to establish cooperative relationships with persons from business, industry, and labor. Below are some suggestions for themes, topics, and groups that might be included for further involvement with business, industry, and labor. This is the part of a brainstorming list; you are encouraged to add to it.

- Identify the various business, industry, and labor professional and trade associations in the state that have a relationship to the work of vocational education.
- Develop a file of resource persons or associations of concern to your organization service area.
- Select a multi-disciplinary panel to assist in developing long-range plans for personnel development.
- Identify resource persons in federal agencies and government who are sources of technical information.
- Involve staff in reading association journals and trade publications as a way of identifying resource persons and keeping up with developments in the field.
- Get staff involved as resource persons in providing assistance to business, industry, and labor-related groups.
- Identify labor education resource persons.
- Establish informal communication with business, industry, and labor representatives for on-going dialogue.
- Identify company sales representatives who are also specialists in various training techniques.
- Identify various private, non-profit training programs for skill training of disadvantaged and special groups.
- Identify various private training school program sources.
- Develop an inventory of staff skills which would be useful to business, industry, and labor related groups.
- Prepare an economic profile of the area, researching the interrelationship between business, industry, and labor in the local economy.

While building a reservoir of information on potential resource persons, the particular needs of educational personnel should be identified.

Determining Development Needs

Frequently, the temptation is to choose a resource person and then arrange a personnel development activity which requires that person's expertise. However, resource persons are most

effectively used in personnel development if they are chosen according to specific needs of vocational education personnel. Workshop speakers should address definite gaps rather than have the agenda develop around available speakers.

Defining the Resource Person's Objective

It is important to set a specific objective for the resource person. For example, if personnel need up-to-date information regarding a current technology, then the resource person's objective will be to provide that information. Unless the objective is well-defined in advance, the resource person cannot be expected to meet the specific needs of his/her audience. Resource persons are frequently used in personnel development programs to:

- Assist in the development of specific activities (for example, personnel exchange or cooperative internships).
- Provide opportunities for site trips to various businesses and industries.
- Provide access to specific additional business and industry personnel.
- Help in the development of curricula relevant to current technology.
- Furnish books, pamphlets, and other printed materials for instructional use.
- Provide exploratory and "hands-on" training opportunities for personnel.
- Furnish instructional aids, e.g., sample kits of raw materials, finished products, exhibits, and training aids for use in personnel development.
- Furnish directories of other business, industry, and labor resource persons.
- Provide opportunities for faculty to obtain work experiences in businesses and industries.
- Conduct seminars on various topics.

Selecting the Means of Presentation

After defining the objective for the resource person's presentation, select the most appropriate means for the presentation by working with the resource person. It may be possible for the individual to fulfill his/her objective through one of several means, including a personal appearance, conference call, the speakerphone, audio tapes, or video tapes. In making this joint decision, several factors should be discussed:

- The object of the presentation (whether or not a discussion is to occur between the audience and the speaker)
- The resource person's and the audience's experience with various media
- Geographic proximity of the resource person

- Availability of required facilities and equipment
- Cost effectiveness

Personal Appearance

In most cases, the preference will be to have the individual make a personal appearance. However, in some instances—because of travel costs or schedule conflicts—it may be most efficient to make other arrangements.

Conference Calls

Another way to utilize speakers is by holding a telephone conference call. The operator in your area can set up a conference call and get all participants on the line at the same time. However, the maximum number of conferees is limited by the telephone equipment used. One advantage of this approach is that everyone gets to talk to everyone else. The operator can figure cost of such an arrangement in advance. Once participants have agreed on the time and date for the conference call, certain steps must be completed.

- To speed connections prearrange the call by:
  - Dialing "0" for operator,
  - Give your telephone number (area code), and
  - Give necessary details: names of participants, telephone numbers (extensions), area codes, cities, specific places (institutions), time to be held, payment arrangements.
- Finally, hold conference call on prearranged date and time.

Speakerphone

The speakerphone attaches to a regular telephone. This unit allows "hands free" conversations. Separate desk-top transmitter and receiver units permit a small or large group to participate in a telephone conversation. The volume button enables the resource person to be heard by large and small groups.

Such a unit can be used for meetings and in place of a conference call. Dial the call collect, put it on the speakerphone and have everyone assembled to participate in the telephone conversation. For private conversations, turn the speakerphone off and proceed in the normal manner.

Audio Tapes

Request an opportunity to tape resource persons from business, labor, and industry who have expertise corresponding to the specific needs of the personnel. Record the conversation including questions and answers. Be certain to include the name of the individual, his/her title, and the

corporation or industry name. Advise that the materials will be used with _____ audience for _____ period of time. The materials will be updated within the time limit set by the company. The original tape may be available for recall at the discretion of the corporation's public relations department and perhaps not reproduced without specific authorization.

Using this format a library can be developed of experts from all over the nation, without extensive costs to the department.

The audio tape approach can help attain objectives, especially if videotaping is unavailable, too expensive, and/or too time consuming.

Videotape

With the current accessibility of closed circuit and cable television, one method to incorporate new concepts and practices into a professional development program is through the use of videotape. For instance, videotaping can be used in simulated collective bargaining sessions or grievance procedures with actual cases. Participants in such a workshop would actually attempt to solve the given situation. Experienced business, industry, labor, and other representatives would actually conduct and direct such a workshop. Below are some guidelines which may help organize such a session:

- Decide on the topic.
- Contact through a letter or by phone business-industry-labor representatives willing to participate in such an endeavor; set limits.
- Decide jointly the location for the session.
- Identify the number and type of participats; set limits.
- Obtain actual grievance cases for each participant and arrange for the necessary video equipment.
- Develop agenda outline for the day.
- Divide participants into groups.
- Videotape each group's session; set time limits.
- Review each group's videotaping.
- Evaluate the session.

Financial Considerations

When determining the amount of funding available for resource persons, examine the following aspects:

- *Department budget*—Have specific and sufficient monies been allocated for expenses associated with the use of resource persons, including travel, honorarium, and per diem expenses?

- *Sharing costs*—Is it feasible to arrange for the use of a resource person on a cost-sharing basis?

- *Cost-free arrangements*—Is it possible to utilize a resource person from a company or an organization which provides no-cost services for educational concerns?

Planning Steps

This list is designed to assist you in planning for the effective implementation of resource persons. The planning steps focus on gathering information, organizing details, and defining objectives.

1. Determine Objectives:

   What are your needs and goals?
   What is target audience?

2. Examine Policies:

   Does your institution have any policy concerning the utilization of resource persons?

3. Determine Strategies:

   What type of strategy(ies) do you wish to use?

4. Obtain Information:

   What information should be given to the resource person?
   What information should be requested from the resource person?

5. Determine Arrangements:

   What type of arrangement do you need to make for the resource person?

6. Select Publicity Arrangements:

   What type of publicity activities?

7. Determine Agenda:

   What items deserve a place on the agenda?

8. Select Evaluation:

   How will the presentation and use of resource person be evaluated?

9. Determine Follow-up:

   What follow-up steps need to be taken?

Implementation

Examining Policies

Prior to beginning the selection process, everyone involved should be knowledgeable about the organization's policy concerning the use of resource persons. Determining existing policy at the outset can help prevent misunderstanding at a later date. Policy procedures to clarify include:

- Travel guidelines—Are coach or first class accommodations designated for airline passengers? Is the "per-mile reimbursement" specified for automobile travel?
- Per diem expenses—Is the cost of meals, gratuities, and lodging limited? Will airline passengers be reimbursed for transportation costs to and from the air terminals?
- Reimbursement procedures—Are the procedures for obtaining reimbursement clearly outlined? Is the resource person required to submit certain forms in order to be reimbursed? If so, are these forms "comprehensible?"
- Consultant/resource person approval procedures—What is the process for obtaining approval to hire a resource person? Is the resource person required to sign an agreement for services rendered?

Familiarity with existing policies and procedures enables the final selection of resource persons to proceed with confidence and efficiency.

Selecting the Resource Person

Whether resource persons are chosen as representatives of groups or organizations or selected as individuals, establish criteria to fit a variety of situations. This criteria should take into account the degree to which the individual demonstrates:

- An intention and ability to prepare for indicated events.
  Does the individual already have numerous obligations?
  Did he/she respond enthusiastically to your inquiry?
  Is he/she noted for dependability?
- An expressed interest in the area of vocational education.
  Has the individual been involved previously in vocational education personnel development?
- An ability to relate to a variety of disciplines and experiences.
  Is he/she able to identify with the particular problems and needs of vocational educators?
- Knowledge and experience in specific content areas.
  Can the individual address the needs of vocational educators in a way that is specific and relevant?

- A capability for dealing with problems and issues.
  Can the individual identify, clarify, and assess concepts and positions?

- A preference for speaking assignments.
  Or does he/she prefer to work in small group discussions?

If the major responsibility of the resource person is to address a large audience, further consider:

- Is the individual a skilled, dynamic public speaker?

- Can a minority or female representative accomplish your objectives?

- What about geographical proximity?

In the final selection of a resource person:

- Try to avoid choosing an individual solely because of his/her status, since "status" does not guarantee that the person will effectively respond to the needs of the organization's personnel.

- Select "backup persons" in case the first choice does not accept.

- Avoid the extensive use of any one person.

- Remember that if an individual agrees to participate in a program and is not utilized, he/she may lose interest.

With the selection of the resource person accomplished, establish the necessary contacts.

Contacting Potential Resource Persons

Establishing contacts in the business, industry, and labor sector is a long-term project. Confidence building is as important an aspect in establishing contacts as is information dissemination.

In making the initial approach to an organization, the educator's knowledge of organizations and/or his/her rapport with individuals within the organization plays a prominent role. His/her firsthand knowledge might dictate, for example, whether the project ought to be approached directly, presented in writing, explored through a third party "insider," or whether it would be more productive and political to have an exploratory conversation.

Depending on the size and complexity of an organization, it is of frequent value to develop an advocate within the organization who can assist in bringing the project to the attention of the right people and who can be expected to represent you with accuracy and conviction. (A sample contact log for use when contacting resource persons is included in Resource Materials.)

Once the resource person has agreed to participate, he/she should receive certain written information. State specifically the expertise needed. State the dates, audience or population to be reached, and the time frame of the presentation. Request the name and title of the person in business, labor, or industry to contact and establish a working relationship with this representative for present and future needs. A summary of information to be given to resource persons includes:

- Purpose of conference, speech, advisory committee, etc.
- Location, date of meeting
- Type of talk/help desired
- Number and type of participants
- Length of time available
- Copy of tentative program
- Financial arrangements agreed upon:
  - Travel
  - Per diem expenses
  - Honorarium
  - How and when payment will be made
  - Paperwork required
  - Accommodation arrangements
- Request for a clearance release

If you intend to publish or disseminate a speaker's presentation, then make arrangements with speaker, look into clearance and/or permission procedures, including:

- Legal requirements
- Institutional procedures
- Contract restrictions
- Clearance/permission procedures

It is particularly important to obtain clearance if you plan to make video or audio tapes of presentations or photograph resource persons.

A sample clearance request letter along with a sample voice and videotape release is included in Resource Materials.

Information to Be Provided by Resource Persons

In addition to providing the resource person with necessary information about the event, he/she will need to supply the following data:

- Date and time arriving/departing
- Transportation arrangements
- Special material/equipment needs
- Paper work needed
- Biographical material (if needed)
- Advance copy of speech (if applicable)
- Agreement on the evaluation input and feedback to the resource person
- Permission of resource person for recording the presentation
- Appropriate biographical career information for introduction
- Any additional needs/expectations

Evaluation of Resource Persons

The effectiveness of resource persons should be evaluated as soon as possible after the presentation. The following questions serve as guidelines.

- Was the resource person's information useful?
- Were his/her materials and presentation clear, helpful, relevant? Did they address a specific need?
- Was the resource person prepared, organized, approachable?
- Were technical aspects of the presentation easily understood?

Resource persons should also be given a chance to evaluate the educational setting and their experience in it. Questions they might answer include:

- Were the presentation setting and audience size agreeable?
- Were there any factors that undercut the effectiveness of your visit?

The educational institute should evaluate the management of the resource person program with an eye towards greater effectiveness and the weeding out of unsuccessful participants. Queries might include:

- How often is the resource pool updated?
- How often are resource persons used?
- At what stage of curriculum presentation can resource persons be most effectively scheduled?

The educational institution should also include in its file on potential community resource persons a summary evaluation of their effectiveness so that future users of the file can get a clear idea whether a particular person fits their defined need. The evaluation can be a composite form incorporating audience evaluation and feedback from the resource person him/herself.

A summary evaluation could be handled in several ways:

- By the advisory committee
- By the coordinators of the resource persons program
- By the educator/administrator who actually requested the visit

The recommendation could be written in paragraph form simply rating the resource person's overall performance. Consider:

- Ability to perform in the particular educational setting
- Ability to generate interest in the topic/skill even when confronted by a disinterested audience
- Effectiveness of presentation
- Ability to communicate useful information

A resource person's file is necessary to eliminate the repeated use of ineffective speakers.

Sample Form

A sample form to assess the effectiveness of the resource person is given below:

Please respond to the following items by checking the appropriate box which best reflects your opinions concerning the usefulness and relevance of the resource persons in your staff development program.

1. The presentation was:

   a. Useful to me.

   ☐ ☐ ☐ ☐ ☐
   Not at All — Extremely Useful

   b. Relevant to me.

   ☐ ☐ ☐ ☐ ☐
   Not at All — Extremely Useful

2. The materials presented were:

   a. Useful to me.

   ☐ ☐ ☐ ☐ ☐

   Not at All — Extremely Useful

   b. Relevant to me.

   ☐ ☐ ☐ ☐ ☐

   Not at All — Extremely Useful

3. The amount of time spent on the presentation was adequate for me.

   ☐ ☐ ☐ ☐ ☐

   Definitely No — Definitely Yes

4. The resource person was accessible.

   ☐ ☐ ☐ ☐ ☐

   Definitely No — Definitely Yes

5. What other topics would you like to have the resource person discuss?

   a. _____

   b. _____

   c. _____

   d. _____

   e. _____

Selected References

This part of the handbook section lists selected reference materials that pertain to the effective use of resource persons. In addition to these materials, each service area has a multitude of organizations and publications that are related to that particular service area. The library should be helpful in identifying these. You are encouraged to add to this list.

Print Materials

Career Education Institute. *Community Resource Guide, Final Report, Vol. IV.* Lewisburg, Pennsylvania: Central Susquehanna Intermediate Unit. (ND) (VT 102 402)

Bottoms, E. et al. *Career Education Resource Guide.* Morristown, New Jersey: General Learning Corporation. 1972.

Hoyt, K. et al. *Career Education in the High School,* Chapter Twelve. Salt Lake City, Utah: Olympus Publishing Company. 1977 (VT 032 718).

Institute for Public Affairs Research. *How to Use Community Resources.* Portland, Oregon: Institute for Public Affairs Research, Inc. (ND) (VT 103 066).

Norton, R. E. *Staff Development Program for Promoting More Effective Use of Community Resources in Career Education,* Section IV. The Center for Vocational and Technical Education, The Ohio State University, Columbus, Ohio, 1974.

Tri-County I.E.L. Council. *Teachers' Guide to Community Resources.* East Peoria, Illinois: Tri-County Industry-Education-Labor Council. 1976.

RESOURCE MATERIALS

The sample materials illustrated in this part are designed to be adapted and used selectively as your situation dictates. The purpose of these materials is to show a variety of standard forms, letters, suggested procedures, and other similar aids that would be useful to vocational educators in selecting and using resource persons.

List of Illustrations:

- Contact Log Worksheet
- Sample Letter to Speaker
- Sample Resource Person File System
- Sample Voice Release for Reproduction Form
- Sample Video Tape Release Form
- Sample Thank-You Letter

Contact Log Worksheet

CONTACT LOG

Name: _____ Page ___ of ___

Person Contacted (Record name, title, address, telephone number in file)	Nature of Information South/Provided	Follow-Up Action Required/Reminder Needed	Contact Date

(Letterhead)

(Date)

(Inside address)

Dear :

We wish to take this time to acknowledge the participation and contribution of (name) of your faculty to the conference entitled (title) that was held at (name of institution), (date).

The major goal of this conference was to provide our (participants) with a broader scope of information on (topic). This goal was achieved with (name) help.

We appreciate the cooperation of the university administration in permitting (name) release time, to participate in this professional development activity.

Sincerely,

(Name)
Program Director

Sample Letter to Speaker

NOTE: A filing system may be organized by topic areas, cross referenced or alphabetically

(front)

Resource Persons

Name:

Organization: Title:

Office:

Address-

Phone-

Home:

Address-

Phone-

(back)

Expertise:	Comments:
Recommended by:	
Date and occasions used:	
Availability (Preference)	

Sample Resource Person File System

VOICE RELEASE FOR REPRODUCTION

I, the undersigned, do hereby grant _____ _____ University, permission to reproduce on magnetic tapes, recording discs, and/or magnetic tape cassettes the finished voice recording of _____ made on _____ to any
Name Date
legitimate use (department title) may deem proper for advertising or educational or commerical purposes or for the purpose of trade. Further, I relinquish and give all right, title, and interest I may have in the finished voice recording, copies, and facsimiles of that recording, and further grant the right to give, sell, transfer, and exhibit those recordings and facsimiles thereof, to any responsible individual, business firm, broadcast studio, or recording studio, or to any of their assignees.

_____ _____
Date Signature

Sample Voice Release for Reproduction Form

VIDEO TAPE RELEASE

I, the undersigned, do hereby grant (name of university), permission to put finished photographs of (date), (name), to any legitimate use ( ) may deem proper for Advertising or Education or Commercial purposes or for the purpose of Trade. Further, I relinquish and give all right, title and interest I may have in the finished pictures, negatives, reproductions, and copies of the original prints and negatives and further grant the right to give, sell, transfer, and exhibit the negatives, original prints, or copies and facsimiles thereof, to any responsible individual, business firm, or publication, or to any of their assignees.

Date _____ Permission granted by

_____
Signature

Sample Video Tape Release Form

(Letterhead)

(Date)

(Inside address)

Dear :

Your willingness to participate as a resource person at our institution is most appreciated. Without your cooperation, this phase of our (class, project, etc.) would not be possible.

The object of these sessions is to provide our (audience) with a broader scope of information on (subject area). We hope to achieve this with your help.

Our group is interested in hearing about (subject area) which you may want to cover.

Your company may have some materials, such as booklets, leaflets, etc., which they would furnish, that you could bring along. Please feel free to bring along any tools or other materials which you work with to display during your talk which should last (time), followed by a discussion and answer period.

We would like for you to meet with (name) on (date) at (time).

Thank you very much for your willingness to participate in our (title). We will be looking forward to seeing you.

Yours truly,

(Name)
Workshop Director

Sample Thank-You Letter

CHAPTER 8

SITE VISITS
Arranged with Business, Industry, and Labor

Introduction

Rationale

John Dewey's concept of "learning by doing" is a basic tenet that is applied by vocational educators. Yet it is often true that the community resources of business, industry, and labor are not adequately made a part of the educational process for both students and teachers. Site visits or field trips offer visual and "hands-on" learning experiences that supplement the classroom learning activities.

Benefits

Site visits acquaint student and faculty participants with evolving technologies and new developments in old fields. These visits achieve educational objectives by providing relevant, practical, and current information. Such visits also allow students to explore possible career internship experiences or future employment. Such visits help broaden the perspective of participants regarding the type of work done in various occupations, as well as help update specific job information.

Planning

Determine Needs and Objectives of Participants

A visit is time well spent if it meets the specific needs of particular groups or individuals. Needs and objectives of faculty, staff, and students may be met through site visit experiences that include:

- Interviewing, interacting, exchanging ideas
- Examining company forms
- Examining employment practices, management procedures, training programs, policies
- Examining new industrial processes and developments or specific processes and developments
- Experiencing real life situations not available in the institution

- Updating knowledge about changes, new job requirements in your specialty field
- Obtaining information about organization structures
- Observing work environment, facilities, interactions
- Opening communication to future placements, to achieve a positive public relations image
- Clarifying particular information or stimulating further research

Identify Potential Sites

Site selection should be based primarily on educational objectives. Information gathered about sites should include a description of the facilities, operation, activities, personnel available, length of visit, and the time available. An active, systematic file of possible sites aids in organizing visits. Card files have proven to be a useful tool in organizing and retrieving needed information. Information to be collected includes:

- Subject area
- Date of contact
- Name/address/phone of organization
- Contact person
- Number of visitors permitted
- Amount of lead time required
- Experiences available
- Instructional materials available

Determine Institution/Department Policies and Procedures

Funding. Identify available funds and determine the costs of the visit. Available funds can determine the extent and type of visit. When determining funding availability, the following sources should be examined:

- Department/institution budget
- Participants
- Industry/business/labor
- Outside organizations
- Sharing costs

Clearance. Investigate and obtain needed institutional clearances.

Travel. Determine method and cost of travel, and the institution's restrictions and liability.

Safety. Be aware of the requirements of the Occupational Safety and Health Act (OSHA). Visitors may be asked to follow safety rules and/or precautions such as wearing earplugs in high decibel areas, wearing safety glasses, wearing helmets, or wearing safety shoes.

Planning Steps Checklist

- ☐ Develop and maintain site visit resource file
- ☐ List needs of potential visit participants
- ☐ List objectives of visit
- ☐ Determine sources of funding
- ☐ Inform interested potential participants about visit
- ☐ Investigate and obtain needed clearances
- ☐ Investigate safety requirements
- ☐ Determine essential informaiton for potential site visit
- ☐ Develop list of participants
- ☐ Determine size of participant group

Implementing

Select Site

Select the site that best meets the need of the individual or group and that fits distance and time limitations. There are various types of site visits that can be adapted and scheduled to meet the needs of the participants. The following list identifies some of the ways site visits can be organized:

- Visits to large industries in a number of states, perhaps planned in cooperation with state associations or other appropriate sources
- Visits within the local community involving business, industry, and labor
- Visits planned with the help of area industry-education councils
- Visits within the educational institution itself or another educational agency

Make Necessary Arrangements

Whenever a site has been selected, the department representative should contact the site host and carefully plan the educational experience. The following preparations should be made:

- Contact host by telephone and follow-up letter
- Obtain basic information about the host

- Preview the tour when planning for a group
- Obtain packets of informative materials about the site for the participants
- Discuss availability of resource materials for participants
- Arrange accommodations if visit is longer than one day
- Have alternative plans available if problems should arise
- Arrange visit itinerary
- Obtain clearance from the host for photography, interviews, and publicity
- Discuss traveling, meals, parking aspects, and related costs
- Check on insurance coverage and safety precautions
- Send follow-up letter confirming details of trip

Conduct the Visit

Upon arrival. Check in with appropriate contact person at the site. An orientation by the site host will usually be given.

Mid-visit. Experience has shown the desirability of a mid-visit conference with the department representative and site host to determine the reactions of the participants to that point. If necessary, correct or revise the remainder of the itinerary keeping the educational objectives in mind.

Conclusion of visit. Each participant or group should meet with the department representative and other persons who have been involved with this visit for a final evaluation before returning home.

Follow-up to the Visit

The following activities should occur after the visit:

- A thank-you note should be written to the host by the visit coordinator and/or participants.
- If the host has given consent, material publicizing the trip should be submitted to the media.
- If this is a trip for course credit, previously agreed upon reports or follow-up activities should be developed.

Evaluation of the Visit

The following items should be considered in evaluation of the visit:

- Get evaluation feedback from (1) the host, (2) the participants, and (3) the group leader or coordinator.
- Share evaluations with the trip host.
- Evaluations should be based on the stated objectives of the visit.
- Evaluation should deal with the planning, types, and quality of the experiences provided.

Implementation Steps Checklist

- ☐ Select site
- ☐ Contact host
- ☐ Set date
- ☐ Make travel arrangements
- ☐ Preview tour
- ☐ Arrange accommodations if longer than one day
- ☐ Set up itinerary
- ☐ Send follow-up letter to confirm arrangements
- ☐ Conduct the visit
- ☐ Send thank-you letter to host
- ☐ Evaluate the site visit experience in terms of the educational objectives

Selected References

This part of the handbook section lists selected reference materials that pertain to the effective use of site visits. In addition to these materials, each service area has a multitude of organizations and publications that are related to that particular service area. The library should be helpful in identifying these. You are encouraged to add to this list.

Print Materials

Dale, Edgar. *Audiovisual Methods in Teaching.* 3rd Edition. New York, New York: Holt, Rinehart, and Winston, 1969.

The Center for Vocational Education. *Module C-1 Direct Field Trips.* Professional Teacher Education Module Series. Athens, Georgia: American Association for Vocational Instructional Materials, 1977.

The Williams-Steiger Occupational Safety and Health Act of 1970. Occupational Safety and Health Administration, Washington, D.C., U.S. Department of Labor.

RESOURCE MATERIALS

The example materials illustrated in this part are designed to be adapted and used selectively as your situation dictates. The purpose of these materials is to show a variety of standard forms, letters, suggested procedures, and other similar aids that would be useful to vocational educators.

List of Illustrations:

- Resource File Card
- Sample Letter Confirming Details of Visit
- Sample Letter of Appreciation
- Participant Evaluation of Visit

Resource File Card

Name of Organization _____
Date of Contact _____
Address _____
Phone _____
Contact Person _____
Number of visitors able to accomodate _____
Best time to contact _____
Amount lead time required _____
Time required for visit _____
Expenses available _____
_____
_____

(back)

Special comments/evaluation:

Resource File Card

(Letterhead)

(Date)

(Inside address)

Dear :

The Vocational Education Department at (name) University will be sponsoring an industrial tour for vocational teachers this summer. The goal of this effort is to familiarize in-service teachers and university faculty members with modern management and manufacturing techniques within specific departments. The long range objective of this visitation is to foster closer vocational ties with the private sector.

As a follow-up to our recent telephone conversation of a week ago, the following schedule is the agreed upon itinerary for the day of our visit.

We appreciate your interest, and willingness to participate in the visitation and look forward to meeting with you on (date). If you have any questions or problems that might occur, please contact me at (phone number).

Sincerely

(name)
Chairperson

Enclosure: agenda

Sample Letter Confirming Details of Visit

(Letterhead)

(Date)

(Inside address)

Dear :

On (date), faculty members of the Vocational Teacher Education Department of (name) University visited your plant to tour the facility and observe new manufacturing techniques. We wish to acknowledge the cooperation of (name) of your company who acted as our host. The experiences he provided to the participants were very beneficial and the visit was an enjoyable experience for all.

We appreciate the cooperation of the management in giving us your time and effort. Thank you for your support.

Sincerely,

(name)

Chairperson

Sample Letter of Appreciation

PARTICIPANT EVALUATION OF VISIT

1. Name of Business: _____

2. Date held: _____

3. Have you received all necessary documentation prior to visit?

   __ Yes __ No

   Comments: _____

   _____

   _____

4. How well was this visit organized?

   __ Very well __ well __ not well

5. Were the objectives for this visit understood by you?

   __ Yes __ No

6. How well has this visit helped you achieve your set objectives?

   __ Very well __ well __ not well

7. List below the strong points and weak points of this visit:

STRONG POINTS	WEAK POINTS
1.	1.

8. Did you have an opportunity to interact with company personnel?

   __ Yes __ No

9. Was enough time allowed for this visit? __ Yes __ No

10. What are your recommendations for future use of such a visit?

    _____

    _____

11. Additional Comments (if necessary)

Participant Evaluation of Visit

CHAPTER 9

RESOURCE DEVELOPMENT
Support from Business, Industry, and Labor

Introduction

Rationale

Staff development, as well as the other dimensions of educational administration and management, requires program support. Inflation, government mandates, and decreased or status-quo revenues all bring an increased pressure on financial resources of educational institutions. When these pressures dictate that some programs must be dropped, staff development is often hit.

To ensure the continuity and/or relevance of staff development, the program director must enlist monetary support from other sources. The success of this effort may depend upon the director's knowledge of and ability to contact organizations which could provide this support.

Benefits

The benefits of external program support can be in the form of grants, fellowships, scholarships, awards, endowments, loans, donations of time and services, and donations of teaching aids, materials and equipment.

In addition to these financial kinds of support, other benefits are possible such as:

- Establishing valuable communication links
- Initiating possible personnel exchanges
- Locating work stations for internships
- Finding job opportunities for graduates

The cooperating organization also benefits in the supporting role. Such benefits include:

- A direct investment in the educational process
- A charitable tax deduction
- Possible employee recruitment
- Possible advisory committee participation

Analyze the Staff Development Program

An analysis of the staff development program is needed in terms of the support required for successful implementation and/or continuation. This support must be considered in the broadest context and will include:

- Human resources—administrative, instructional, supporting staff, resource persons
- Financial resources
- Facilities and equipment—buildings, classrooms, demonstration areas, furniture, instructional equipment
- Supplies/materials—visual aids, curriculum materials, office supplies

Assess the Adequacy of the Available Resources

Assess the adequacy of available resources needed to implement and maintain the staff development program. A work breakdown chart will be useful in highlighting the resources required for each task, subtask and activity.

A Gantt chart or similar time line will supplement the work breakdown chart and help deal with the essential element of time. Samples of a work breakdown chart and a Gantt chart are located in the Resource Materials section of this chapter.

Project the Need for Additional Resources and Initiate Planning

The need for and the nature of additional program support becomes apparent after comparing resource needs with those that are readily available. The gap between projected needs and "on hand resources" is the additional support needed.

The plan for resource development will be more effective and will lend itself to concrete evaluation if it is built around goals and objectives that are written in measurable terms. While a goal is a statement of broad intent that is timeless, a measurable objective lists the desired accomplishments to be reached within a given period of time. These kinds of objectives contribute to greater understanding of the total plan and also automatically provide the evaluation criteria.

Correspondence with advisory councils or support coordinators at similar institutions will provide information helpful in the planning process such as:

- How broad is the institution's voluntary support?
- What is the relationship between the institution and the local community?
- Which companies are the most prominent contributors to program support?

- Is the alumni association well organized?
- Are the trustees financially committed to the institution?
- Does the institution report on its stewardship of the resources entrusted to it?

Locate the Additional Resources

Location of additional program support will be augmented through the formation of an advisory committee. Existing department advisory committees might be utilized to help enlist program support or an ad hoc committee might be organized to aid in planning for and securing program support.

An advisory committee could assist by:

- Identifying strategies for building support in the business, industry, and labor community
- Encouraging business and industries to help provide support
- Assisting in the identification of potential contributors
- Reviewing program support plans
- Making suggestions for implementing and/or improving program support

Other alternatives for locating additional program support are:

- Labor unions—trade unions; The American Federation of State, County and Municipal Employees; craft unions
- Associations—American Association of Community and Junior Colleges; American Society for Training and Development; Business-Industry Advisory Councils; National Association for Industry-Education Cooperation; National Association of Labor Education and Research Collaboration; The National Alliance of Businessmen; National Association of Women Business Owners; Council for Occupational Education; National Manpower Institute; National Association of Manufacturers

Develop Plan of Action

The following plan of action reflects an appeal to business, industry, labor for support.

Disseminate program support project description. Effective contact with and use of the news media is part of any promotional activity. Community program support development is no exception. Obtain clearance for any press releases or photographs.

Potential audiences include:

- State/local Chambers of Commerce
- Existing advisory committees

- In-school or on-campus fund raising activities
- Business office regulations

Is the plan practical in view of local considerations? Be sure that the plans for obtaining program support are appropriate in view of current pressures on the institution's policy-making board and the administration.

Such local situations could include possible board and administration concern over:

- Racial desegregation
- Elimination of sex bias
- Need to reduce staffing
- Need to reduce programs
- Tax levies

Is there enough time? The implementation of plans for program support may require the approval of special committees of the policy board. Establish a schedule which provides adequate time for:

- Board committee presentations
- Contact with individual board members
- Presentation to appropriate central office decision-makers
- Preparation of proposals
- Development of evaluation criteria

Does the plan set a precedent? If the plan for obtaining program support contains elements that are new, it will be necessary to study the implications in terms of the operation of the institution. Is the plan likely to set a legal precedent? Will the plan bring about accounting problems for the business office or employee problems for the personnel office? If a similar plan has been used elsewhere, it may be possible to learn from the experience of others.

Is the plan clearly understood by the decision-makers? The goals and objectives of the plan stated simply and in measurable terms should be incorporated into a proposal and transmitted to the appropriate department heads and central office administrators as soon as possible.

Encourage their contributions to the planning process via regularly scheduled meetings. Periodic memos will update the responsible persons on the current status of the plan.

Assessing Impact

Review the Objectives of the Plan

As suggested in the planning section of this chapter, the plan for resource development will be more effective and will lend itself to concrete evaluation if it is built around goals and objectives that are written in measurable terms. The objectives automatically become the criteria by which a realistic assessment can be made.

- Business and industry societies
- Local civic service clubs
- State/local unions
- Owners and managers of local business and industries

Ways to distribute information include newspapers, luncheon meetings, newsletters, brochures, radio stations, television programs, surveys, and advisory committees.

Information to be part of any dissemination activity includes:

- Objectives of the support project
- Need for support
- Type of support needed
- How to participate
- Benefits to business, industry, labor
- Assurance that donor will be identified with program
- Name and address of contact persons

Implementing the Resource Development Plan

The successful implementation of plans will be the most difficult aspect of obtaining program support. Certain essential components should be considered so that the planning process will achieve the desired results. The following questions should be answered:

Is the plan consistent with institutional policy and/or procedures? Personnel development functions are not independent from the operation of the institution. Consistency of policy and practice must be maintained. Study the practices and procedures handbook of the institution's policy board. Check with appropriate central office personnel or with the policy board secretary. State and federal regulations may need to be considered as well.

Be sure that the plan does not conflict with practices and policies that deal with:

- Employee overtime
- Employee or student transportation
- Accident and liability insurance
- Unauthorized use of institutional facilities

Review these objectives to determine the kind of information needed to perform the assessment of the planning effort. Gather the information and compare the results of the program support effort with the objectives. Interpret the results and revise the plan as required.

Selected References

This part of the handbook section lists selected reference materials that pertain to the effective development of resources. In addition to these materials, each service area has a multitude of organizations and publications that are related to that particular service area. The library should be helpful in identifying these. You are encouraged to add to this list.

Print Materials

Annual Register of Grant Support. Marquis Academic Media, Marquis Who's Who, Inc., Chicago, Illinois, 1977.

Catalog of Federal Education Assistance Programs. U.S. Department of H.E.W., Washington, D.C., 1974.

Catalog of Federal Domestic Assistance. Superintendent of Documents, Government Printing Office, Washington, D.C. 20202.

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Derfner, C. "City Hall: An Important Resource for Your Organization," The Grantmanship Center News, Vol. 2, No. 5, Los Angeles, California.

Dermer, J. *How to Write Successful Foundation Presentations.* New York, N.Y. Public Service Materials Center, 355 Lexington Avenue 10017, 1974.

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RESOURCE MATERIALS

The example materials illustrated in this part are designed to be adapted and used selectively as your situation dictates. The purpose of these materials is to show a variety of standard forms, letters, suggested procedures, and other similar aids that would be useful to vocational educators.

List of Illustrations:

- Sample of Work Breakdown Structure
- Sample Gantt Chart
- Seeking Scholarship Money from Business/Industry

SAMPLE OF WORK BREAKDOWN STRUCTURE

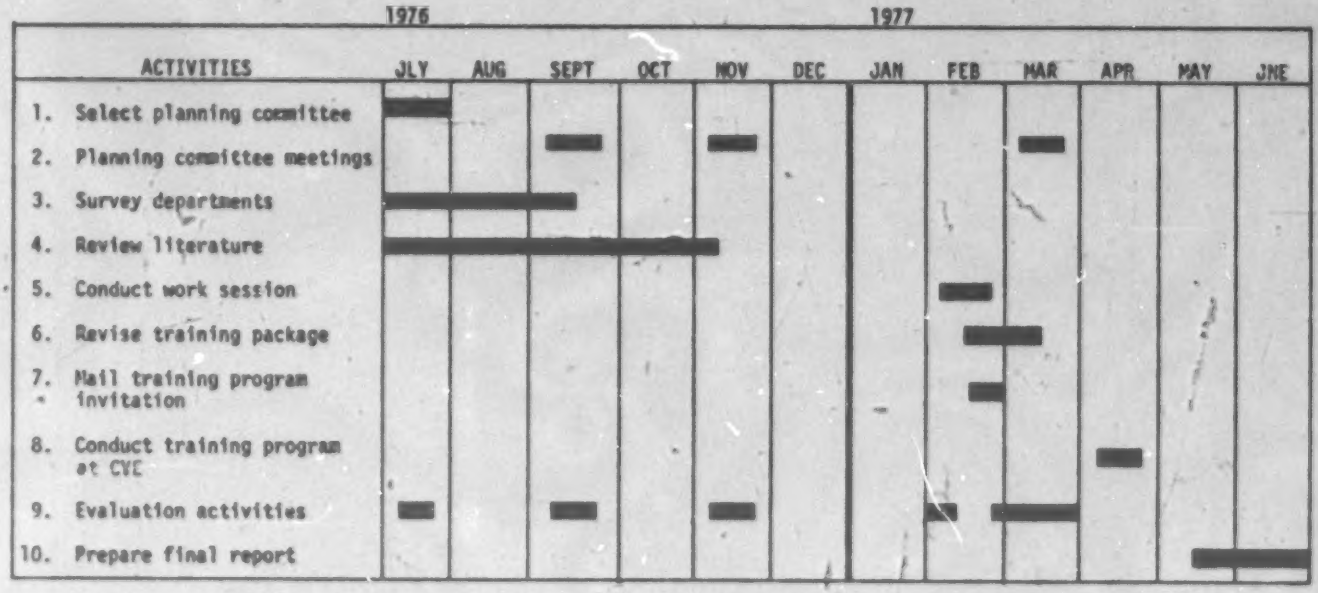
Project: To increase the number of vocational teacher education departments that have developed strategies to maximize the inputs of business, industry and labor.

OBJECTIVE	ACTIVITY	TASK
1.0 To conduct a review of related literature	1.1 Establish methodology and conduct search	1.1.1 Identify objectives 1.1.2 Search ERIC 1.1.3 Search AIM/ARM-NTIS 1.1.4 Search card catalogs
	1.2 Review and synthesis of literature	1.2.1 Conduct preliminary review of literature 1.2.2 Present preliminary review to planning committee 1.2.3 Conduct on-going review

Sample of Work Breakdown Structure

Sample Gantt Chart

SAMPLE
GANTT CHART



Lehigh University
Career Education

Seeking Scholarship Money from Business/Industry

BENEFITS AND ROLE OF LOCAL BUSIENSS/INDUSTRY
OR
WHAT'S IN IT FOR ME?

Early Recruitment
J. I. F.

FINANCIAL COOPERATION	RECRUITMENT COOPERATION	WORK EXPERIENCE COOPERATION
Since Lehigh University does not receive a state subsidy for vocational teacher education as do the three state related institutions, the cost per college credit is much higher at Lehigh. Potential vocational teachers who cannot usually afford the higher cost, are forced either to drive long distances to take credits at one of the other institutions or to abandon their efforts at teacher preparation. Because the early recruitment program is attempting to attract local personnel, many of whom have full-time jobs and are not ready or able to make a full commitment to teaching, reasonably priced courses at Lehigh are a necessity. Through the Joint Investment in the Future (JIF) Program, Lehigh is seeking scholarship money from business/industry which will help bring the cost of college courses in line with what potential teachers can afford. The benefits to business/industry from the JIF Program include a charitable tax deduction, a real involvement in local education at both the college and vocational high school level, and potentially highly qualified teachers who will provide the needed workers of the future.	The involvement of business/industrial personnel in recruitment is essential because they may be in the best position to identify potential teachers who have the necessary skills, knowledge and motivation. Cooperation can range from simple encouragement to complete financing of the employee's teacher education program either through JIF or by other arrangements. In some cases this involvement may force a hard decision between keeping a good employee on the job and encouraging him to explore teaching. However, the effect of one good employee can be multiplied many times if he or she becomes a highly motivated and competent teacher able to produce highly motivated and competent graduates of our local vocational schools. That teacher will be in a position to bless his former employer many times over by providing top graduates trained to the needs of the employer.	In those instances when a recent AVTS or Community College graduate demonstrates the motivation to become a teacher, but lacks the necessary trade experience local industry is in a position to provide it. This experience will need to be comprehensive and attainable within several years so that trade competency can be certified and the individual can begin teaching without undue delay. Again, the benefit from this type of cooperation is obvious. If the individual progresses and becomes a successful teacher, the employer receives all of the benefits described above and for a greater number of years. If the individual decides in favor of a business/industrial career with the employer, a valuable employee has been gained. In either case, the employee carries his own weight during his employment.

CHAPTER 10

EVALUATING THE STAFF DEVELOPMENT PROGRAM

Introduction

Pressure on educational institutions to evaluate their programs is increasing. Diminishing resources and the demand for accountability have brought a renewed interest in determining the success of various programs in relation to their purposes.

When the integrity and purpose of the program is established through adequate evaluation, the administrative staff will have increased confidence in the program managers, the governing board will support the administration, and the taxpayers will continue to maintain a financial commitment to the institution.

Adequate evaluation does not occur by chance; it must be planned for. This chapter provides information that will assist the program manager in planning for the evaluation of the total staff development plan.

Evaluation—What Is It?

Evaluation is the process of determining the effectiveness of a program or an instructional unit so that decisions can be made to bring about improvement. While most educational research is not designed for day-to-day decision making, program evaluation can be a helpful tool to assist the educator in studying program effectiveness.

Evaluation is a continuous process and is an integral part of a program. Evaluation occurs before the program plan begins, during the implementation of the plan, and after the plan is completed. Evaluation cannot exist as a separate entity.

Evaluation—Why It Is Necessary?

Evaluation should be looked upon as a tool that is necessary to ascertain the value of the program at different points in time. Feedback from three areas: needs assessment, program objectives and program activities should be continuous.

Evalauation will determine whether the program is accomplishing the objectives for which it was designed. It will identify strengths and weaknesses of the program soon enough that appropriate revisions can be made. Evaluation will determine whether the program benefits justify the cost. An information base will be established for use by administrators and policy board members in making decisions affecting the program.

There are additional reasons for program evaluation. The results can be used to reinforce public support for the program and to provide a feeling of satisfaction and accomplishment for the participants.

Determine which group(s) would benefit most from the evaluation results. Put the results in an appropriate format and distribute soon enough that the staff development program can benefit from corrective action if necessary.

How to Plan an Evaluation

Before an evaluation method is chosen or a specific evaluation tool is designed, the evaluation should be planned. One way to think out the evaluation process in order to fit your needs is to answer the question: *Who* needs *what* information, *when* and in *what format?* Figure 1 illustrates this process:

Figure 1

PLANNING THE EVALUATION

Questions	Definition of the Question	Example
Who?	Who is the information collected for?	Dean/Administrator
What?	What information should be collected?	Effectiveness of Inservice Training
When?	When is the information needed?	May 28, 19.....
What Format?	How will it be shared?	Short written report listing the strengths, weaknesses, and recommendations for improving inservice training.

Evaluation—Types of Evaluation

Three types of evaluation are useful to educators.

The first type results in the needs assessment. This type occurs during the program planning stage and focuses on the identification of top priority needs.

The second type of evaluation is the interim evaluation and takes place during the development of the program or instructional unit. This is also called formative evaluation. Its purpose is to adjust the instructional process and to measure learner progress toward the attainment of

specified objectives. Interim (formative) evaluation allows the educator to make mid-course corrections to assure that the objectives are met in the most effective manner.

The type of formative or interim evaluation activities used will vary with individual needs. Paper and pencil measures such as questionnaires, cognitive tests, attitudes scales and performance tests are often used. However, other measures such as interviews, simulations, review of records (e.g., attendance), assessment of products developed by learners, reviews by external panels, case histories, and systematic observation can provide the evaluator with a wealth of information.

The third type of evaluation is the final evaluation and takes place at the end of a program or instructional unit. Final evaluation (summative) measures the achievement of the learner and the success or failure of the program or instructional unit.

Summary

While the reasons for evaluation may vary, they generally center around determining it the top priority needs have been identified, how the program can be improved and whether or not the program has had impact. Figure 2 illustrates the three types of evaluation.

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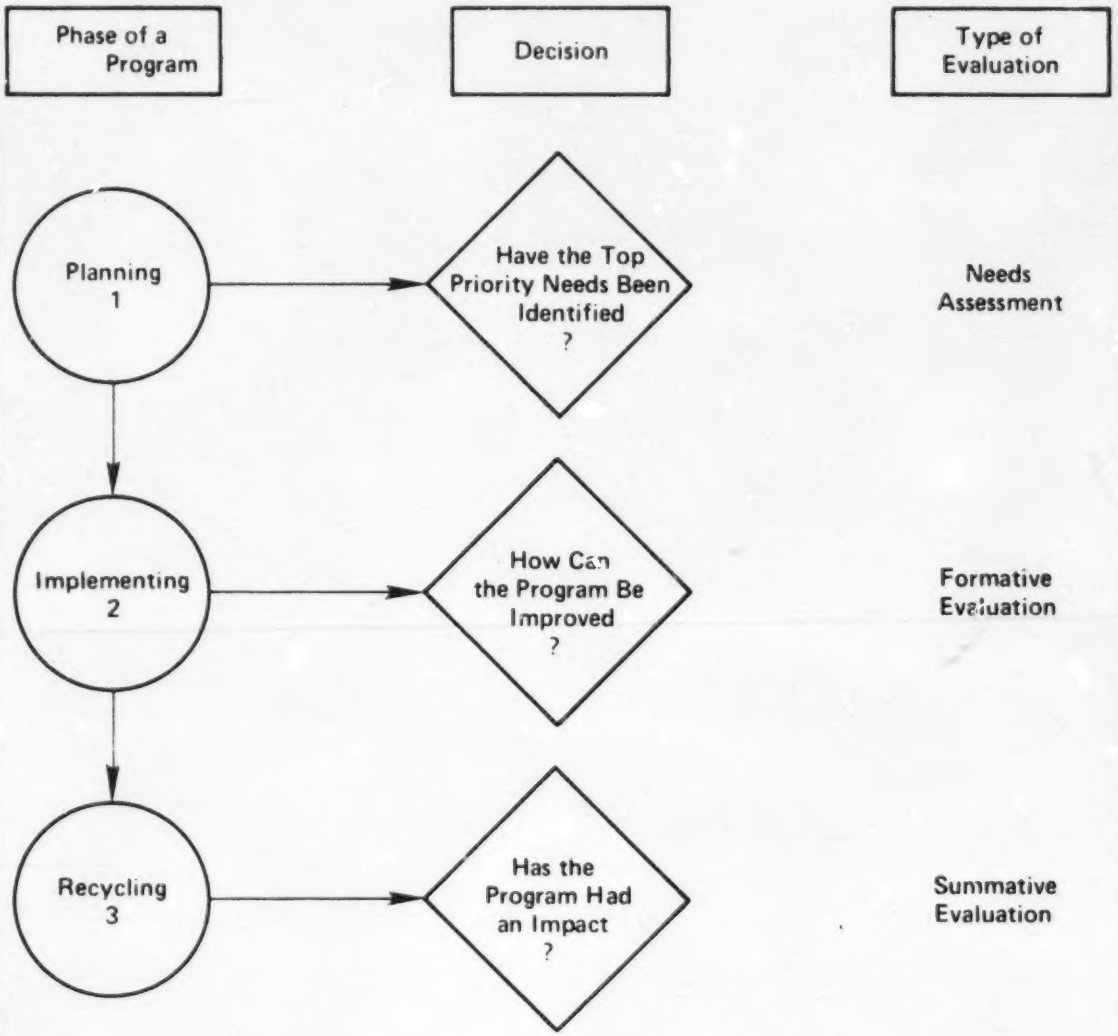
Figure 2

TYPES OF EVALUATION



Adapted from: Adams, Kay Angona and Walker, Jerry P., *Improving the Accountability of Career Education,* The Center for Vocational Education, 1977.

RESOURCE MATERIALS

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List of Illustrations:

- Final Evaluation

IMPLEMENTING PERFORMANCE -
BASED TEACHER EDUCATION WORKSHOP

Final Evaluation

Please provide your candid responses to the following questions about the workshop. The information is requested in order to determine whether or not the workshop met your needs and its objectives. It will be used to provide feedback to the funding source concerning the quality and impact of the seminar and to provide workshop planners with information for improving future workshops. All data will be held in confidence.

Background Information

1. What is your present position?

   ____ Educational institution representative

   ____ State Department of Education representative

   ____ Other (specify) _____

2. Have you attended any workshops on performance-based teacher education prior to this one?

   ____ Yes ____ No

   If yes, how many have you attended? _____

Seminar Planning and Implementation

Rate the overall quality of the individual areas of the seminar as compared to typical professional development seminars you have attended by circling the appropriate rating for each of the following items.

1.	Was the organization and operation of the workshop effective?	Poor 1 2 3 4 5 Excellent
2.	Were the choices of seminar focal areas relevant?	Not Relevant 1 2 3 4 5 Very Relevant
3.	Was the work of the consultants effective?	Poor 1 2 3 4 5 Excellent
4.	Were the conference calls useful?	Not Useful 1 2 3 4 5 Very Useful
5.	Were the small group meetings useful?	Not Useful 1 2 3 4 5 Very Useful
6.	Were the materials you received useful?	Not Useful 1 2 3 4 5 Very Useful
7.	Were the opportunities for your professional development sufficient?	Very Inadequate 1 2 3 4 5 Completely Ample
8.	Were the opportunities for informal interaction and exchanges sufficient?	Very Inadequate 1 2 3 4 5 Completely Ample
9.	Were your major concerns addressed during the workshop?	Definitely No 1 2 3 4 5 Definitely Yes
10.	Do you feel ready to further implement PBVTE at your institution?	Definitely No 1 2 3 4 5 Definitely Yes
11.	Were the workshop location and facilities satisfactory?	Dissatisfied 1 2 3 4 5 Satisfied
12.	What is your overall satisfaction with the workshop?	Dissatisfied 1 2 3 4 5 Very Satisfied

Comments: _____

_____

_____

Final Evaluation (Continued)

Seminar Objectives

Indicate, by circling the appropriate rating, how effectively the workshop met its objectives.

Did the workshop assist you:	Definitely No				Definitely Yes
1. To interact with other participants and consultants in order to solve PBVTE implementation problems at your institution?	1	2	3	4	5
2. To develop a plan of action specifying implementation strategies for PBVTE to be used at your institution?	1	2	3	4	5
3. To identify problems relative to the implementation and use of PBVTE at your institution?	1	2	3	4	5

Presentations

Please rate the effectiveness of the presenter and the quality of the content by placing a check (✓) in the most appropriate box in both the left and right columns for each presentation.

Effectiveness of the Presenter					Topic	Quality of the Content				
Excellent	Good	Average	Fair	Poor		Excellent	Good	Average	Fair	Poor
					1. "Change Process: The Concerns-based Model" (Hall) - 10/5/77					
					2. "Implementation: The Houston Experience" (Hollis) - 10/5/77					
					3. "Evaluation: Performance and Program" (Schalock) - 10/5/77					
					4. "Introduction to Planning Activities" (Adams) - 10/5/77					
					5. Conference Call (University of Nebraska) - 10/6/77					
					6. Conference Call (University of Vermont) - 10/6/77					
Effectiveness of Group to Identify Strategies						Quality of Interaction				
					7. Group Strategy Identification Sessions (Identify Group) 10/5/77					

Final Evaluation (Continued)

Comments and Recommendations

1. The stronger features of the workshop were:

2. The weaker features of the workshop were:

3. What suggestions would you make for improving the workshop?

4. What suggestions would you make for the dissemination conference in June (e.g., format, content, length)?

5. What suggestions would you make regarding the provision of technical assistance (e.g., topical areas, procedures)?

Final Evaluation (Continued)